

COURSE CATALOGUE

Knowledge Bureau 2026 Educational Programs

**Our Students Learn More,
Earn More, Share More!**



World-Class Financial Education

Who Should Study with Knowledge Bureau?

A Knowledge Bureau Education is designed for individuals who want practical, defensible, and career-building courses in personal or corporate taxation, accounting, wealth management, and financial services.

- **Earn More.** Earn best-in-class professional certification in income tax preparation and accounting to increase income.
- **Learn More.** Licensed financial advisors and insurance professionals will find world class Continuing Education (CE) here.
- **Share More.** Attract and retain more engaged team members with turnkey and affordable workplace training solutions.

Knowledge Bureau provides flexible online learning pathways supported by expert instruction, real-world application, and ongoing professional support.

Canada's Leader in Multi-Disciplinary Training

Over **20,000** in the Knowledge Bureau Network

Over **1.2 Million** CE/CPD Course Certificates

Over **25,000** Certificate Course Graduates

Over **1,800** Distinguished Designation Graduates

Over **16,200** Live-Virtual Event Attendees

Over **12,100** Undergraduate Students

Inside This Catalogue

Foundational & Team Training



Professional & Specialized Credentials



Leadership Designations



CE Master Certificates



Let's Connect:

learn.knowledgebureau.com | 1.866.953.4769

A MESSAGE FROM EVELYN JACKS, PRESIDENT



WE ARE DELIGHTED TO WELCOME YOU TO KNOWLEDGE BUREAU!

We are delighted to introduce you to Knowledge Bureau—Canada’s leading provider of practical, professional education for tax, accounting, wealth management, and financial services professionals. For more than two decades, Knowledge Bureau has supported professionals at every stage of their careers with real-world learning designed to build technical confidence, professional credibility, and long-term success. It’s ideal training for new entrants too!

Our course catalogue offers flexible learning pathways, from foundational professional development to advanced diplomas, specialized credentials, and CE/CPD mastery programs. Learners can build core competencies, develop deep technical expertise in a chosen vocation, or pursue professional designations that demonstrate leadership and defensible advice.

Beyond coursework, Knowledge Bureau connects learning to the real world. Through the Knowledge Bureau News Network, including Real Tax News podcasts and the Knowledge Bureau Report, professionals stay current on evolving tax and financial issues while earning CE/CPD credits. Live learning opportunities such as CE Savvy Summits and the Acuity Conference for Distinguished Advisors offer expert insight, peer connection, and opportunities to celebrate professional achievement.

Our team of educational consultants and instructors is committed to supporting you every step of the way—from program selection to graduation and beyond. We invite you to explore our course catalogue and take the next step in investing in your professional future.

Sincerely,

Evelyn Jacks, President
Knowledge Bureau

Let's Connect:

1-866-953-4769

learn@knowledgebureau.com

learn.knowledgebureau.com



World-Class Financial Education

Knowledge Bureau Educational Programs 2026

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EDUCATIONAL PATHWAYS



No Risk Free Trials Available!

"...Excellent content, well planned out and presented. The case studies were very useful and I thoroughly enjoyed completing them... Everything I learned can be applied in my work environment.

-Karen S., SK

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 Training

Income Tax Fundamentals Certificate

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



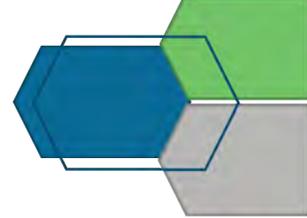
Certified Tax Preparer Certificate

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



Let's Connect:

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



2026 Educational Calendar

SPRING SEMESTER

April

- Apr. 3: **Official CE Transcript** for Grads and Designates 3 months to Designate Relicensing Deadline
- Apr. 15 **CE Master Micro-Credential Offer Deadline** Earn 15 CE Credits Online with One Hour Courses

May

- May 13: **Early-bird deadline – May CE Savvy Summits**
- May 27: **CE Savvy Summit – Advanced Retirement & Estate Planning** 20 CE Credits - Live Virtual Event – 8:30 to 4:30 CT
Featuring the Distinguished Designate Experience: Retirement Case Study

June

- June 15: **DMA Designation Program – Summer Registration Deadline** Earn 30 Plus CE Credits Online 24/7 – start anytime
- June 18: **Half Day CE Mini Summit - Business Builder – Peak Performance** Earn 5 CE Credits - Live Virtual Event – 8:30 to 12:30 CT
Featuring the Distinguished Designate Experience: Case Study Qualifies for Compliance Credit* 12:30 – 1:30
- June 30: **KB Designate Relicensing Deadline** VIP Affinity Program Renewal
- June 30: **MFA-P™ Registration Deadline** Earn 20 CE Credits - Annual 20% off promo
- June 30: **Acuity Conference for Distinguished Advisors (DAC)** Early-bird deadline

SUMMER SEMESTER

July

- July 7: **Official CE Transcript** for Grads and Designates 12 months to Designate Relicensing Deadline
- July 31: **CE Master Micro-Credential Offer Deadline** Earn 15 CE Credits Online with One Hour Courses

August

- August 31: **Workplace Training Consultations** Negotiate Group Rates on Training for Your Firm
- August 31: **CE Master Micro-Credential Offer Deadline** Earn 15 CE Credits Online with One Hour Courses

September

- Sept 9 : **CE Savvy Summit – Audit Defence – Sept 23** Early Registration Deadline
- Sept 15: **DMA Designation Program – Fall Registration Deadline** Earn 30 Plus CE Credits - Online 24/7 – start anytime
- Sept 23: **CE Savvy Summit – Audit Defence** Earn 20 CE Credits - Live Virtual Event – 8:30 to 4:30 CT
Featuring the Distinguished Designate Experience: Case Study 12:00 – 12:30
- Sept 30: **Acuity Conference for Distinguished Advisors** Second Early-bird Deadline

FALL SEMESTER

October

- Oct 2: **Official CE Transcript** for Grads and Designates 9 months to Designate Relicensing Deadline
- Oct 22: **CE Savvy Summit – Year End Tax Planning – Nov 5** Early Registration Deadline
- Oct 30: **Acuity Conference for Distinguished Advisors** Final Deadline

November

- Nov 5 : **CE Savvy Summits – Year End Tax Planning** Earn 20 CE Credits Live Virtual Event – 8:30 to 4:30 CT
Featuring Distinguished Designate Experience – Case Study 12:00 – 12:30
- Nov 22: **Acuity Conference for Distinguished Advisors, Victoria BC** Nov 22 – Opening Reception & Grad Awards

December

- Dec 15: **DMA Designation Program – Winter Registration Deadline** Earn 30 Plus CE Credits Online 24/7 – Start Anytime

YOUR EDUCATIONAL EXPERIENCE

A structured path to becoming a highly skilled, certified specialist who can deliver exceptional value in the marketplace.

ONLINE COURSES:

Study on your own in your own time with personal instructor support. Start any time!

LIVE-VIRTUAL EVENTS:

Study peer-to-peer in full or half-day instructor-led sessions. Complement your online studies!

Online & Live-Virtual Event Course Components:

- Free Program Trials!
- Comprehensive Online Knowledge Journals and Study Guides
- Recorded Presentations from Expert Instructors
- Online Tax Research Library
- Comprehensive Online Knowledge
- *Fully Flexible - Risk Free Guarantee, course switches at no charge
- Selected courses also include Professional Tax Software: TaxCycle from Xero, DTMax from Thomson Reuters, Profile from Intuit. Professional Bookkeeping Software: SAGE 50 Accounting from Sage, Quickbooks Online from Intuit

ACUITY CONFERENCE FOR DISTINGUISHED ADVISORS (DAC): NOVEMBER 22 TO 24 VICTORIA, BC.

An annual strategic networking, educational conference and awards ceremony. Open to all. Don't miss it - especially if you are a 2026 graduate or a practice Business Builder.

RISK-FREE MONEY BACK GUARANTEE

Participate in a risk-free trial of the first chapter of a certificate course for seven days. There are no refunds after seven days from initial registration, or if you start chapter 2.

See detailed terms & conditions for additional academic policies and refund policies.



LEARN MORE:

learn.knowledgebureau.com
1.866.953.4769

"I get a wealth of information in the courses and during a Summit."

**- Melissa Wenderski
DMA-Tax Services Specialist™**

TUITION & FUNDING

EVERYTHING IS INCLUDED WITH YOUR TAX-DEDUCTIBLE TUITION!

SESSIONAL DEADLINE: JUNE 15

Knowledge Bureau welcomes individual student registrations and group enrolments. Tax deductible tuition fees may be paid by e-transfer or credit card. Pay by instalment or reduce tuition costs by paying in full. Check out early-bird deadlines and inquire about volume discounts for additional savings!

SPECIALIZED DESIGNATIONS



RWM™	Real Wealth Manager	\$1,795
MFA-P™	Master Financial Advisor - Philanthropy	\$1,795
DMA™	Distinguished Master Advisor*	\$3,970

*6 30-Hour Certificate Vocational Courses
\$662 Each - Regular Tuition \$995 (save 33%)

Choose From the Following Specializations:

Personal Tax Services Specialist

- Professional Income Tax Filing - Level 1
- Professional Income Tax Filing - Level 2
- Filing Proprietorship Returns
- Filing Returns at Death
- Filing T3 Returns
- Retirement Income Planning

Accounting Services Specialist

- Bookkeeping in a Digital World
- Accounting for Multiple Business Profiles
- Advanced Payroll for Small Business
- Budgeting and Forecasting for Small Business
- Understanding Business Valuation
- Accounting for Business Growth & Transition

Corporate Tax Services Specialist

- Corporate Tax Filing Fundamentals
- Tax Planning - Corporate Owner-Managers
- Tax Planning - Incorporated Professionals
- Investment Tax Strategies
- Succession Planning
- Cross Border Taxation

Small Business Services Specialist

- Leading Teams
- Building Business Plans
- Scaling Business Operations
- Understanding Contracts
- Privacy Principles
- Succession Planning

FOUNDATIONAL TRAINING

	EACH
Certified Tax Preparer 20 Hour Course & 4 Half-Day Summits	\$895
Regular Tuition \$995 (save 10%)	
Income Tax Fundamentals Certificate	\$595
Regular Tuition \$695 (save 14%)	

CE MASTER CERTIFICATES



	EACH
DMA - Certificate Courses	\$895
Any 1 - 30 Hour DMA Course	
Regular Tuition \$995 (save 5%)	
Professional Practitioner Diploma	\$850
Any 2-30 Hour DMA Courses.	
Regular Tuition \$995 (save 8%)	
CE Summit - Advisory Diploma	\$398
4-Full Day CE Savvy Summits	
Regular Tuition \$795 each (save 50%)	
CE Savvy Advanced Update Summits	\$795
(January, May, September, November)	
Save additional \$100 to early-bird deadlines	
CE Master Micro-Credentials	\$695
Collections of 15 Micro-Courses	
Acuity Conference	\$1,795
For Distinguished Advisors (DAC)	

Tuition offers expire June 15. All taxes extra.

Did You Know? Our Graduates Qualify for VIP Affinity Reductions:

Designates: take an additional \$200 off
Certificate or Diploma Grads: take an additional \$100 off

Group Training Rates Also Available!

LEARN MORE:

learn.knowledgebureau.com/tuition
1.866.953.4769



WORKPLACE TRAINING

Training Opportunities for Tax, Accounting & Financial Services Firms and Groups

TRAINING FOR TODAY'S TAX AND FINANCIAL SERVICES TEAM

Knowledge Bureau is a leading private educational institute specializing in workplace training for tax, accounting, and financial services firms—helping teams keep pace with regulatory change and digital transformation while building consistent, practical expertise.

With Knowledge Bureau Your Organization Can:

1. Train new and returning staff
2. Provide real time online courses with instructor-supported training 24/7
3. Include live virtual classes for instructor-led and peer-to-peer experiences.
4. Outcomes include:
 - Highly trained teams ready to confidently meet complex client needs.
 - Certified, cutting-edge competencies in tax, accounting and financial services.
 - Enhanced professionalism: high standards, consistent outcomes
 - A culture of continuous learning that supports performance, retention and long term skill building.

CHOOSE YOUR OWN CUSTOM-DESIGNED EDUCATION SOLUTION

Knowledge Bureau's training solutions deliver value at both the individual and firm level, with flexible, 24/7 access and start-anytime learning. Firms benefit from a structured approach to professional development that supports performance, retention, and long-term skill building for new and returning employees.

Our Training Helps Organizations:

- Strengthen technical competency across teams
- Promote consistent application of tax and financial rules
- Reduce rework, errors, and compliance risk
- Support credential maintenance, and CE requirements
- Build a culture of continuous learning and professional confidence

Make a Great Training Decision!

Invest in structured, scalable education pathways that future-proof your organization's knowledge and skills.

Let's Connect: Schedule your free 15 to 30 minute consultation to learn more about customizing your training solutions.

"Knowledge Bureau has earned its reputation as a world class financial educator. Always at the forefront of change, Knowledge Bureau offers a premier educational experience."

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

LEARN MORE:

learn.knowledgebureau.com/train
1.866.953.4769



WORKPLACE TRAINING

Customize Your Training Plan!

Who Is This Training For?

NEW TO TAX & FINANCIAL SERVICES? Training Especially for New Entrants

Canada's Income Tax Fundamentals Course

Learn Canada's tax system, including income reporting, deductions, credits, capital gains, rental income, and tax software. Designed for new entrants, this 20-hour course builds confidence through practical, real-life tax scenarios using professional-grade software.

KB TI Tax Prep School in Your Office

Half-day virtual events for new and developing tax preparers, led by dynamic instructors and supported by peer learning. In the convenience of your own office - our instructor lead training offers complete flexibility. CE Mini Summits provide practical training, certification, and career-building skills for early-stage professionals.

EXPERIENCED PROFESSIONALS? Education to Train the Trainers

Leadership Designations

Real Wealth Management™ (RWM™) and Master Financial Advisor - Philanthropy (MFA-P™) are advanced Leadership Designations for experienced tax and financial professionals committed to leading with influence and purpose.

CE Master Micro-Credentials

CE Master Micro-Credentials are compact, accredited micro-courses that deliver targeted expertise in key financial disciplines.

learn.knowledgebureau.com/train
1.866.953.4769

RETURNING OR SEASONAL STAFF? Improve Individual Credentials

DMA Designation Program

6 - 30 Hour Certificate Courses

Technical Expertise in 4 Vocations:

Personal Tax Services Specialist

- Professional Income Tax Filing - Level 1
- Professional Income Tax Filing - Level 2
- Filing Proprietorship Returns
- Filing Returns at Death
- Filing T3 Returns
- Retirement Income Planning

Accounting Services Specialist

- Bookkeeping in a Digital World
- Accounting for Multiple Business Profiles
- Advanced Payroll for Small Business
- Budgeting and Forecasting for Small Business
- Understanding Business Valuation
- Accounting for Business Growth & Transition

Corporate Tax Services Specialist

- Corporate Tax Filing Fundamentals
- Tax Planning - Corporate Owner-Managers
- Tax Planning - Incorporated Professionals
- Investment Tax Strategies
- Succession Planning
- Cross Border Taxation

Small Business Services Specialist

- Leading Teams
- Building Business Plans
- Scaling Business Operations
- Understanding Contracts
- Privacy Principles
- Succession Planning

Professional Practitioner Diploma

Choose 2- 30 Hour Online Vocational Courses from a selection of 27 in the DMA Program.

FOUNDATIONAL TRAINING



Build Technical Expertise to Earn CE/CPD Credits

 **Knowledge
Bureau®**
World-Class Financial Education

LET'S CONNECT:

learn.knowledgebureau.com

Reception@knowledgebureau.com

1.866.953.4769

CERTIFICATE INCOME TAX COURSES

Especially for New Entrants to Income Tax Preparation

File simple tax returns confidently.

Get hooked on taxes preparing true-to-life case studies on professional tax software, and attend live-virtual training.



World-Class Financial Education

EARN CANADA'S INCOME TAX FUNDAMENTALS CERTIFICATE

Learn to Prepare Tax Returns for Friends and Family in just 20 hours online. Learn about income reporting, deductions, credits, capital gains, rental income, on professional tax software in the convenience of your home or office.

Study 24/7; start anytime.

Course Curriculum:

- Understanding Canada's Digital Tax System
- What Income is Taxable
- Claiming Refundable Tax Credits and Social Benefits
- Claiming Non-Refundable Tax Credits
- Claiming Deductions
- Reporting Income from Self-Employment
- Reporting Capital Gains
- Rental Income
- Practice Management Thesis – Using Your Tax Software

Everything Is Included!

- Educational Consultation & Virtual campus orientation
- Lesson and study plans
- Personal instructor email support
- Comprehensive Knowledge Journal
- EverGreen Explanatory Notes - Online Research Library
- Professional Tax Software (Student Versions)
- Testing and certification
- CE/CPD accreditation

EARN THE CERTIFIED TAX PREPARER CERTIFICATE

Take an additional 16 hours of virtual instruction with dynamic faculty to consolidate your knowledge in four separate sessions.



Families, Employees & Investors

Session 1: Introduction to Canada's Tax System: NETFILE and EFILE, MyAccount, Refundable Tax Credits, Deductions for RRSPs, First Home Savings Accounts, child care, moving, medical and employment expenses and much more.



Calculating Capital Gains

Session 2: Learn how to treat asset acquisitions and dispositions on a T1. Topics include the disposition of publicly traded shares, mutual funds, bonds private businesses, farms and personal property.



Families & Real Estate

Session 3: Focus on family tax credits income, expenses and depreciation with attention to short term rentals and claiming losses.



Small Business

Session 4: Learn to prepare tax returns for proprietorships including capital cost allowance schedules, and reporting income from home-based businesses, ride sharing, subcontracting, and deductions from CPP remittances.

learn.knowledgebureau.com/taxfundamentals
1.866.953.4769

Take Both the 20 Hour Course & 4 Recorded Sessions:
Save 64% on Tuition and then Make Money as a
Certified Professional

Course Curriculum

Chapter 1: Understanding Canada's Digital Tax System

This chapter will introduce you to the Canadian personal tax system. We'll discuss who should file a return, your obligations to the CRA and theirs to you. What are EFILER's and the professional responsibilities they have with the CRA and their clients.

Chapter 2: What Income is Taxable?

In this chapter, you'll learn about what is taxable in Canada and what is not. You'll learn about exempt income, employment income, investment income, pension income, employment insurance income, and self-employment income.

Chapter 3: Claiming Refundable Tax Credits and Social Benefits

In this chapter you will learn what refundable tax credits are and about social benefits. You will learn about Canada Child Benefit, GST/HST credit (now Canada's Groceries & Essentials Benefit), Canada's Workers Benefit, Multigeneration Home Renovation Amount, Old Age Security, Canada Disability Plan, Canada Training Credit, and Provincial Benefits.

Chapter 4: Claiming Non-Refundable Tax Credits

In this chapter you will learn what non-refundable tax credits are. You will learn about basic personal amount, age amount, eligible dependent, caregiver, medical and disability amounts, tuition, charitable donation and adoption credits amongst the other valuable credits for home buyers which that serve to reduce income taxes payable. This is different from refundable credits, which are of more value to those with little or no income.

Chapter 5: Claiming Deductions

In this chapter you will learn the different types of deductions found on the T1 return and how they impact the size of both net and taxable income. Deductions such as Registered Pension Plan and First Home Savings Account contributions, child care, moving, and employment expenses, deductions for spousal support payments, CPP deductions and more that lead to the calculation of net income, the figure upon which many refundable and non-refundable tax credits are calculated.

Chapter 6: Reporting Income from Self-Employment

Students will learn how the relationship with the CRA differs for the self-employed on the T2125 Statement of Business or Professional Activities which includes reporting income, inventory, deductions, capital asset acquisitions and dispositions and how to avoid audit risk, especially when claiming losses or paying family members to properly report income and expenses. The unincorporated business owner is required to report the net income on the T1 Income Tax and Benefits Return. Form T2125 Statement Of Business Or Professional Activities will be used to do so.

Chapter 7: Reporting Capital Gains

You will learn what a capital gain is, how and when it is calculated. You will also learn that it is possible to have a capital gain or loss with varying rules, on a series of 8 reporting categories including capital gains on tax slips, from financial, real estate and business investments, as well as personal use properties including family heirlooms and cottages.

Chapter 8: Rental Income

More Canadians are earning rental income from a suite in their home, a separate short or long term rental unit. Learn the new rules for staying onside with CRA and minimize taxes paid by claiming all deductions available. Find out how to report rental income when there are multiple owners or co-ownerships between spouses. Learn how to avoid audit problems expensing improvements and repairs.

Practice Management Thesis and Exam:

This chapter summarizes the key concepts you have learned about income tax filing fundamentals using the T1 Income Tax and Benefits Return, and consolidates your knowledge with dozens of true-to-life tax scenarios to work out on student versions of professional tax software. It's a fun challenge to get ready for the final exam initiate a truly professional process by integrating the four pillars of tax planning with the tax preparation task.



SPECIALIZED CREDENTIAL DESIGNATIONS



THE DMA DESIGNATION PROGRAM
Certificate Courses Leading to Designation



LET'S CONNECT:

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1.866.953.4769



SPECIALIZED CREDENTIALS

Explore New Certification Programs for Your Professional Development

TECHNICAL INDUSTRY EXPERTISE IN 4 VOCATIONS

- **Personal Tax Services Specialist**
- **Corporate Tax Services Specialist**
- **Accounting Services Specialist**
- **Small Business Services Specialist**



Develop a rewarding career path with DMA Specialized Credentials - and stand out as a trusted expert in today's competitive financial services landscape.

Risk-Free Money-Back Guarantee!
Take an Orientation or Free Course Trial Online.

Certificate Courses & Diploma Programs are also available for professional training, one at a time, and as professional development options in a series.

Accreditation:

30 CE/CPD Credits Per Certificate Course (KB, CPA, FP Canada General Credit)

Personal Tax Services Specialist

- Professional Income Tax Filing - Level 1
- Professional Income Tax Filing - Level 2
- Filing Proprietorship Returns
- Filing Returns at Death
- Filing T3 Returns
- Retirement Income Planning

Accounting Services Specialist

- Bookkeeping in a Digital World
- Accounting for Multiple Business Profiles
- Advanced Payroll for Small Business
- Budgeting and Forecasting for Small Business
- Understanding Business Valuation
- Accounting for Business Growth & Transition

Corporate Tax Services Specialist

- Corporate Tax Filing Fundamentals
- Tax Planning - Corporate Owner-Managers
- Tax Planning - Incorporated Professionals
- Investment Tax Strategies
- Succession Planning
- Cross Border Taxation

Small Business Services Specialist

- Leading Teams
- Building Business Plans
- Scaling Business Operations
- Understanding Contracts
- Privacy Principles
- Succession Planning

REGISTER NOW!

learn.knowledgebureau.com/courses
 1.866.953.4769



Help Families & Businesses in Your Community As a...



DMA - PERSONAL TAX SERVICES SPECIALIST™

Work in Tax, Accounting & Financial Services

Deepen Your Knowledge of Taxes & Their Impact on Lifetime Income and Capital



World-Class Financial Education

Learn personal tax filing on a deep level for employees, investors, small business owners, seniors and families. Tax planning advice to those experiencing new life events that include births and deaths, marriages and divorces, career starts or stops, or new asset acquisitions.

Your Program Enrolment Includes:

- Personal course selection consultation and virtual campus orientation
- Lesson plans and study plans
- Personal instructor support by email
- Comprehensive online Knowledge Journal
- Tax Tip Toolkit: EverGreen Explanatory Notes and RWM™ Discovery Calculators
- Practical true-to-life case studies using professional software
- Testing and certification

Start a New Career with Marketable Skills Especially For:

- Income Tax Preparation
- Tax Accounting for Small Businesses
- Wealth Management
- Insurance Advisory
- Financial Planning
- Trust Offices
- Or build your tax accounting practice by educating your whole team as professional tax practitioners.



Accreditation:
30 CE/CPD
Credits
Per certificate course



Qualifies for Canada
Training &
Tuition Credits



Work at Your Own Pace!
Continuous intake 24/7
Take up to three months per 30 hour
certificate course

Start today - Study online - Everything is included!

Student Testimonial:

"Every tax preparer in my small company now has completed more than one Knowledge Bureau certificate course. I am proud to say that I have achieved the Tax Services Specialist Designation, and most of my staff are well on their way to either a diploma or a designation."

- Wayne Blackmere, ON

REGISTER NOW!

learn.knowledgebureau.com/credentials | 1.866.953.4769

Enrol Now or Request More Information

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Professional Income Tax Filing – Level 1

This course introduces a proven process for consistently accurate T1 tax preparation services with a professional client interview and document management system, as well as a thorough understanding of tax preparation for the five anchor profiles upon which every personal tax return is based—credit filing, employees, families and children, investors, and seniors.

Professional Income Tax Filing – Level 2

Fully updated into the latest federal budget and featuring true-to-life scenarios, this comprehensive course delves deeply into more complex filing for claiming employment expenses including commission sales, retirement and investment income, capital gains and losses, filing for business start-ups, and a comprehensive overview of claims for medical, disability, and death of a taxpayer scenarios.

Filing Proprietorship Returns

Learn how to account for the taxation of income for proprietorships including GST/HST requirements, claiming of business expenses, including business assets, home based businesses, hiring human resources, inventories, disposing of and replacing a business, farming and fishing enterprises, professionals and partnerships.

Level 2 Courses: Mastery & Specialization

Earn specialized skills and deep professional knowledge:

Filing Final Returns at Death

This course deals comprehensively with the taxation of individuals at death and the new relationship survivors will have with the CRA when taxpayers die. Gain a thorough understanding of how income and capital accumulations are taxed on final returns and learn strategies to minimize taxes.

Filing T3 Returns

Trust filing in Canada has significantly changed and this course will help you decipher the new rules. It introduces you to the types of trusts that may be created in Canada and how each of them is taxed. Students will learn how to prepare T3 returns as part of the case study exercises in the course. The students will also learn how to optimize taxes payable on income earned by a trust with the Trust Tax Estimator tool, provided with this course. The new filing requirements for bare trusts will also be discussed.

Retirement Income Planning

You will learn a process for helping your clients envision their plan for the three stages of retirement based on a holistic, values-based strategy, types of investments can be offered in a group investment plan, different employer sponsored plans, as well as how employees can maximize their options with these accumulations when leaving a job, strategies required to build a pension income for your clients from various sources of income, and tax efficiency on retirement income layering in 5 micro-courses.

Student Testimonial:

"This course includes a tremendous amount of useful information. My objective was to learn how to prepare tax returns for small proprietorships, in order to expand my practice. In addition, I do bookkeeping for small businesses and was keen on gaining a better understanding of tax requirements, so that I could be a better bookkeeper. I have acquired a wealth of knowledge and feel a lot more confident about the services I am offering to my clients".

—Sylvie G., YT





Support Owner-Manager Compensation and Succession As A...



DMA - CORPORATE TAX SERVICES SPECIALIST™

Work in Tax, Accounting & Wealth Advisory Offices

Deepen Your Knowledge of Corporate Taxation, Compliance & Strategic Planning



World-Class Financial Education

Learn about corporate tax filing fundamentals and then help owner-managers who may include incorporated professionals plan compensation: salary, dividends, capital gains, and bonuses. Assist with transition and succession planning pain points.

Your Program Enrolment Includes:

- Personal course selection consultation and virtual campus orientation
- Lesson plans and study plans
- Personal instructor support by email
- Comprehensive online Knowledge Journal
- Tax Tip Toolkit: EverGreen Explanatory Notes and RWM™ Discovery Calculators
- Practical case studies using well-known professional software
- Testing and certification

Start a New Career with Marketable Skills Especially For:

- Tax Practitioners
- Bookkeepers & Accountants
- Business Consultants
- Owner-Managers
- Financial Planners
- Insurance Advisors



Accreditation:
30 CE/CPD Credits
Per certificate course



Qualifies for Canada Training & Tuition Credits



Work at Your Own Pace!
Continuous intake 24/7
Take up to three months per 30 hour certificate course

Start today - Study online - Everything is included!

Student Testimonial:

"It is important that we are proactive in terms of planning our clients' affairs. Knowledge Bureau continues to provide me with relevant knowledge and strategies to help my clients navigate through the complex world of finance, life and taxation."

- George Donkor, On

REGISTER NOW!

learn.knowledgebureau.com/credentials | 1.866.953.4769

Enrol Now or Request More Information

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Corporate Tax Filing Fundamentals

This course serves as an introduction to the filing of a corporate income tax return for small business operating under a corporate structure as a Canadian Controlled Private Corporation (CCPC). From a company's transformation from Proprietorship through to Corporation, this course will teach you the fundamentals of filing a T2 return for the majority of small business corporations. operating in Canada today.

Tax Planning for Corporate Owner-Managers

This course has been designed to teach you how to advise private business owners and managers about the best ways to manage his or her compensation to maximize the amount of after-tax income available. You will gain a solid understanding of the options available when constructing compensation packages.

Tax Planning for Incorporated Professionals

This course focuses on personal and corporate tax planning for small to medium sized businesses, owned and operated by professionals, with a special focus on financial advisors and medical practitioners. Retirement and succession planning is also an integral part of the course.

Level 2 Courses: Mastery & Specialization

**Earn specialized skills and deep professional knowledge:
Complete your designation program with these three additional courses**

Investment Tax Strategies

Learn a strategic and tax-efficient investment income planning process which places capital accumulations in the right hands of individuals in the family. The objective is to save capital and earn investment income with tax-efficiency and then to average down the tax paid on both by arranging to share with family members within the tax rules allowed. As important: planning to avoid tax erosion of the capital at transition times.

Succession Planning for Owner-Managers

This course will help advisors become valuable resources to their clients in the succession planning process. Key concepts include understanding the importance of succession planning for the business and key positions within the business. It focuses on roles and financial issues, from both the perspectives of a business leader and successor. It also addresses the impact of succession on employees and the business as a whole.

Cross Border Taxation

This course focuses on emerging issues as baby boomers age, technology makes it possible for people and businesses to operate globally, and economic changes make it appealing for people and businesses to purchase investment property globally. As well as the increase in the sharing of financial information between countries, cross border taxation issues become key for cross border employment, entrepreneurship or asset ownership, as does the issue of residency and U.S. citizenship.

Student Testimonial:

*"Great details on different types of corporations and great questions that test your knowledge.
Love the Knowledge Journal as a reference"*

- Jason Atkinson, BC



Become an Indispensable Part of Any Organization as a...



DMA - ACCOUNTING SERVICES SPECIALIST™

Earn New Specialized Credentials and Unlock a Career in High-Demand Accounting roles.

Build Expertise in Financial Reporting, Compliance & Advisory Services



World-Class Financial Education

The field of accounting is more than just numbers; it's about financial health, strategic planning, and business intelligence. This comprehensive program is designed to equip you with the essential skills needed to thrive in today's dynamic business environment.

Why Choose This Specialized Credential?

Job-Ready Skills: Gain practical expertise that employers are actively seeking.

Career Advancement: Position yourself for roles with increased responsibility and earning potential.

Flexibility: Learn on your own terms, 24/7, at home or office!

You Will Master Key Skills In:

- Bookkeeping and Financial Record Keeping
- Financial Statement Preparation
- Payroll Administration
- Tax Preparation Fundamentals
- Accounting Software Proficiency



Accreditation:
30 CE/CPD
Credits
Per certificate course



**Qualifies for Canada
Training &
Tuition Credits**



Work at Your Own Pace!
Continuous intake 24/7
Take up to three months per 30 hour
certificate course

Start today - Study online Everything is included!

Personal support, lesson plans, comprehensive online study materials, libraries, calculators, practical case studies and well known professional software, testing and certification.

There is even a risk-free money-back guarantee!

Start your path to a rewarding financial career today!

Student Testimonial:

"Having graduated from this designation program with honours, I have enriched my knowledge, improved professional business skills that expands my future career path. Overall, it is an excellent experience to explore throughout the program."

- Connie H.M. Zhu, DMA-Accounting Services Specialist™

REGISTER NOW!

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Enrol Now or Request More Information

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Professional Bookkeeping for Small Business

Bookkeeping in a Digital World is the perfect course for professionals in the bookkeeping, tax and financial services who wish to train their administrative staff to prepare company books, or for those with the professional role of preparing books for others.

Accounting for Multiple Business Profiles

In this course, you will learn to manage the bookkeeping functions for a variety of companies to deliver financial results from the simplest to a complex company. Using the features of SAGE 50 and Intuit QuickBooks Desktop, learn advanced bookkeeping for a variety of business profiles.

Advanced Payroll for Small Businesses

Payroll rule changes have created an increased demand for knowledgeable bookkeepers who can administer payroll. Advanced Payroll will help you become a more astute compliance manager, while being a shrewd negotiator when helping your clients with employment contracts that address the after-tax benefits for employees and their family members.

Level 2 Courses: Mastery & Specialization

Earn specialized skills and deep professional knowledge:
Complete your designation program with these three additional courses

Budgeting & Forecasting for Small Business

This course is perfect for professionals in bookkeeping, tax and financial services to gain the skills needed to assist or direct the budgeting process. This course contains references to IFRS and ASPE as well as an updated QuickBooks example.

Understanding Business Valuation

The objective of this course is to provide an overview of the fundamentals of business valuation, enabling advisors to understand the key concepts in this important area and assist clients in facing various types of business transactions, including mergers, transfer of an ownership position, sale of a business, or raising capital

Accounting for Business Growth and Transition

This course addresses a range of areas that might be encountered during the evolution and growth of a company. Those who work in the accounting function will gain an understanding of how to take a leadership role in creating a value centered department that could help to support the growth and development initiatives that occur over the life cycle of a business.

Student Testimonial:

"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."

– W. Samplonius, DMA–Accounting Services Specialist™





Enhance Business Growth & Position Firms to Scale as a...



DMA - SMALL BUSINESS MANAGEMENT SPECIALIST™

Perfect for New Entrepreneurs and Business Builders



World-Class Financial Education

Business owners need to work on their businesses instead of just in them. Help develop business and succession plans as well as foundational policies and procedures to position the firm to scale. Learn more about business contract law, privacy and security matters critical to business success.

Your Program Enrolment Includes:

- Personal course selection consultation and virtual campus orientation
- Lesson plans and study plans
- Personal instructor support by email
- Comprehensive online Knowledge Journal
- Tax Tip Toolkit: EverGreen Explanatory Notes and RWM™ Discovery Calculators
- Practical case studies using well-known professional software
- Testing and certification

Start a New Career with Marketable Skills Especially For:

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



Accreditation:
30 CE/CPD Credits*
Per certificate course



Qualifies for Canada
Training &
Tuition Credits



Work at Your Own Pace!
Continuous intake 24/7
Take up to three months per 30 hour certificate course

Start today - Study online - Everything is included!

Student Testimonial:

"My objectives were to understand how to better help clients and this program delivered. Challenging concepts were made simple with practical and direct learning."

- Susan Javier, MB

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Enrol Now or Request More Information

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

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.

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.

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.

Level 2 Courses: Mastery & Specialization

**Earn specialized skills and deep professional knowledge:
Complete your designation program with these three additional courses**

Understanding Contracts

This course offers provides a basic understanding of the legal framework that businesses generally operate under. It provides students with the ability to recognize and identify potential legal traps. The course also provides practical tips that allow for the review and understanding of basic contract language and provisions.

Privacy Principles

This course will introduce you to your obligations towards management of personal information in your possession. This includes identifying what is personal information and sensitive personal information, best practices in relation management of collection, use, storage, retention, and destruction of personal information so as to build credibility and reputation in your business.

Succession Planning

This course will help advisors become valuable resources to their clients in the succession planning process. Key concepts include understanding the importance of succession planning for the business and key positions within the business. It focuses on roles and financial issues, from both the perspectives of a business leader and successor. It also addresses the impact of succession on employees and the business as a whole.

Student Testimonial:

"I found this program very practical and directly useful for my personal family affairs as well as my professional position as a financial advisor. I believe this is a course that can help provide guidance to anyone who has to deal with their own family or client's business issues."

—Phyllis B., ON



1.866.953.4769



learn@knowledgebureau.com



www.knowledgebureau.com

LEADERSHIP DESIGNATIONS



Real Wealth Management™ & MFA-P™ Programs



LET'S CONNECT:

learn.knowledgebureau.com

Reception@knowledgebureau.com

1.866.953.4769



Earn New Leadership Credentials as a Real Wealth Manager



RWM™ DESIGNATION PROGRAM

Provide Tax Efficient Wealth Management Services

Become the Strategic Lead in Providing Intergenerational Planning



World-Class Financial Education

Learn the skills to develop strategies for accumulation, growth, preservation and transition of sustainable wealth. The RWM™ - Real Wealth Manager engages family stakeholders with a multi-disciplinary financial team in achieving sustainable, long-term financial objectives.

Connect with Real Wealth Managers™ from Coast-to-Coast!

Network, Collaborate and Contribute! Your Membership to the Society of Real Wealth Managers is included when you enrol.

Your Program Enrolment Includes:

- Personal course selection consultation and virtual campus orientation
- Lesson plans and study plans
- Personal instructor support by email
- Comprehensive online Knowledge Journal
- Tax Tip Toolkit: EverGreen Explanatory Notes and RWM™ Discovery Calculators
- Practical case studies using well-known professional software
- Testing and certification

Start today - Study online - Everything is included!

The Next Step in High Value Services Of Special Interest to:

- Financial Advisors
- Tax Consultants
- Estate Planners
- Insurance & Investment Advisors
- Divorce, Eldercare, and End of Life Counsellors
- Accountants
- Lawyers
- Portfolio Managers



Become an RWM™



Lead an Advisory Team



Build Strong Relationships



Take Impactful CE

Student Testimonial:

"In my opinion, Knowledge Bureau's programs are the best and deliver the most valuable content. It is not just another designation. It is a community and a culture."

-Stefanie Keller, CFP, RWM™, FDFS™

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Enrol Now or Request More Information

Who is the Real Wealth Manager™?

Your Strategic Lead in Intergenerational Wealth Planning

A Real Wealth Manager™ (RWM™) is a Designated financial professional who serves as the strategic lead, working collaboratively with other professionals to deliver fully integrated solutions to a common intergenerational wealth strategy. Acting as both financial advocate and steward, the RWM™ supports family stakeholders in achieving sustainable, long-term financial objectives.

Core Responsibilities

The RWM™ identifies the Chief Family Influencer (CFI), the stakeholders to the RWM plan and develops the strategy that will enable an accountable and structured process focused on four key elements in joint decision-making:

- **Accumulation**
- **Growth**
- **Preservation**
- **Transition of Wealth**

Special attention is given to the risks to income and capital due to wealth eroders such as inflation, taxes, and fees. The object is financial peace of mind and sustainability of wealth goals to provide choices in meeting future financial objectives.

Key Functions

- **Intergenerational Planning:** Tailors financial strategies to individual and family goals, taking into account required decision-making for life, financial, and economic events.
- **Multi-Generational Focus:** Develops long-term tax-efficient financial strategies across generations, ensuring seamless transitions during life and career changes.
- **Collaborative Advisory Model:** coordinates the RWM™ Strategy with a network of professionals—including portfolio managers, tax experts, lawyers, estate planners, and other specialists—to address evolving family needs.
- **Stewardship & Accountability:** Acts as the central point of contact and accountability, ensuring all stakeholders adhere to the agreed-upon strategy and documentation.
- **Preservation-Oriented:** Prioritizes the protection of after-tax income and capital while managing risk factors, including inflation and the costs to a wealth management plan.

Professional Standards

Real Wealth Managers™ hold the RWM™ designation, demonstrating advanced training and a commitment to ethical standards and continuous education. They are trusted, knowledgeable, and well-connected professionals who help families navigate financial complexities—now and into the future.



Synonymous With High Standards

“We are proud to be the exclusive post-secondary educational institution offering the RWM™ Certificate of Distinction as well as the DMA™ and MFA-P™ Designation Programs, each of which lead financial professionals to a deeper level of specialization in their chosen field of expertise. Tens of thousands of professionals in the financial services, tax and accounting fields have trained with us over the years. **A Knowledge Bureau Education is synonymous with high standards of excellence.**”

Our programs include self-study courses conveniently available online, development leading to Specialized Credentials and CE Mastery recognized as highly implementable in the tax, accounting and financial services. Ask us about custom-designed programs for training in your workplace...Let's connect!”

- Evelyn Jacks, Founder and President

Curriculum For The Real Wealth Management™ Program

Part A: RWM™ Strategy

- Defining Real Wealth Management™
- The Strategic Approach In Real Wealth Management™
- The RWM™ Process
- The Costs Of Building Wealth

Part B: RWM™ Process

- Accumulation
- Growth
- Preservation
- Transition
- Objective-Based Family Planning

Part C: RWM™ Theory - The Tax Backdrop

- Tax Strategies: Managing Sources Of Income And Capital
- Cross-Border Issues: Canadians & US Investments
- Start-Ups: Incorporated Or Unincorporated
- CCPC Planning: Understanding Shareholder Equity
- CCPC Planning: Shareholder Remuneration

Part D: RWM™ Practice Management

- Leading The Real Wealth Management™ Strategy
- Sharing The Plan With Inter-Advisory Stakeholders
- Analysis, Accountability And Go Forward Planning
- You, The Real Wealth Manager™

RWM™ Program qualifies for these CE Credits:

Includes CE Credits from KB and Third Party Accreditation: ICM 43952 (30CE), AIC 67814 (20CE), CIRO 24-0786P cycle 10 (20 PD) MFDA 1000003453 (20 PD)

This program is recommended for those with the following designations: CFP, CIM, CLU, CPA, DMA, EPC, FCSI, LL.B., MFA, MFA-P, PFP, RFP, RPA.

Student Testimonial:

“I help business owners, their employees and families achieve their dreams by taking a holistic approach to financial planning. We look at all areas of investment, insurance, tax & estate planning. I want to work with like-minded advisors to help our clients accumulate, grow, preserve and transfer their wealth.”

- Doug Buss, CLU, CPCA, CFP, CEA, RWM™, President, YourStyle Financial Inc.



WHAT SKILLS DOES A REAL WEALTH MANAGER™ HAVE?

The RWM™, the primary advisor in providing comprehensive and collaborative wealth advisory services, is specifically trained to lead strategic decision-making by an inter-advisory team with family stakeholders. The steps to this approach include:

- **Possessing** deep knowledge in the advisor’s field of practice
- **Acting** as the **primary advisor** through a strategic process of decision making
- **Listening** for the client’s life and financial triggers
- **Strategizing** using the “Four RWM™ Elements”: Accumulation, Growth, Preservation and Transition of sustainable wealth
- **Managing** the team of specialists to provide required expertise for financial solutions
- **Implementing** the RWM™ strategy on an efficient after-tax, after-cost basis with all stakeholders
- **Analyzing** financial data expertly and consistently over time to meet financial milestones
- **Reviewing** and adjusting the strategy and process to meet ongoing client objectives

CLIENTS WANT CUSTOMIZED SOLUTIONS

According to a recent study* by the CFA Institute, “the connection between professional skills and customer outcomes must become more symbiotic ... wealth managers must demonstrate greater relevance to the current and future needs of clients and prospects.” The RWM™ cements his or her relevance to the family by confidently delivering customized financial strategies based on client objectives and goals with a process for accountable solutions over time. Your clients will appreciate the opportunity to make sound financial decisions with a most trusted advisor who really knows them well and can help them visualize the future while navigating a complicated financial world. The result is a pathway to true affluence and peace of mind.

*The Value of Premium Wealth Management, 2017

EARN A PRESTIGIOUS CERTIFICATE AND THE RWM™ DESIGNATION

The great wealth transition is here. Now is the time to help families with the complexities of tax and estate planning leading advisors can now differentiate themselves with this advanced level designation that complements the standard designations held by many planners, advisors and accountants.

Differentiate yourself with this advanced level designation that complements the standard designations held by many planners, advisors and accountants.

- Become the primary advisor through all market conditions and life cycles
- Enhance your skills, fast-track your career and elevate client services
- Increase assets, revenue, team efficiency and profitability
- Work effectively with and increase referrals from other professionals
- Differentiate yourself from the mass of designation holders with a unique education

ADVANCING LEADERSHIP IN TAX-EFFICIENT WEALTH MANAGEMENT

The Society welcomes Real Wealth Manager™ (RWM™), Master Financial Advisor – Philanthropy (MFA-P™), Distinguished Master Advisor (DMA-Specialist™), and FDFS™ Designates.





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.



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.

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

"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



Knowledge Bureau

World-Class Financial Education

"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!

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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.

Six 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.

Six 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.



Advancing Leadership in Tax-Efficient Wealth Management

THE SOCIETY OF DISTINGUISHED DESIGNATES



- Shared Commitment to Financial Education
- Leaders in Evolving Financial Services to Meet Community Needs
- Advisement Through Analysis, Deep Discussion & Mentorship



World-Class Financial Education

Of Special Interest to Designated Professionals Who Provide Intergenerational Wealth Management Solutions

About the Society of Distinguished Designates

The Society of Distinguished Designates at Knowledge Bureau brings together learned specialists who share a commitment to advancing professional excellence, elevating advisory leadership, and supporting the evolution of tax accounting, legal and wealth management services.

The Society welcomes Real Wealth Manager™ (RWM™), Master Financial Advisor – Philanthropy (MFA-P™), Distinguished Master Advisor (DMA-Specialist™), and FDFS™ Designates.

The goal is to provide a collaborative environment to enhance your influential role as Educators, Advocates, and Stewards within a growing professional community.



Purpose & Vision:

The Society exists to strengthen professional practice through shared learning, meaningful dialogue, and leadership development. As a member of this distinguished network, you will engage in networking and leadership opportunities to enhance and shape the future of tax-efficient wealth management in the following ways:

- **Educator** - A Demonstrated commitment to world-class financial education and lifelong professional development.
- **Advocate** - Leadership in evolving financial services to meet the changing needs of clients, communities, and industry.
- **Steward** - Advisement through analysis, mentorship, and thoughtful discussion that advances best practices.

Membership: How to Join the Society of Distinguished Designates

Complimentary and automatic for undergraduates enrolled in a designation program. Designates Alumni renew their license to use their certification marks with an annual attestation to professional standards.

LET'S CONNECT

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Ready to Get Involved? Enrol In a Designation Program or Request More Information

MEMBERSHIP APPLICATION FORM

3 EASY STEPS TO MEMBERSHIP:



Use the QR code to get started online

- 1. Become an Undergraduate:** Register in a Knowledge Bureau Designation Program as an Undergraduate, and membership is included at no cost during your study term.
- 2. Become a Licensed Alumni:** following program completion, renew annual certification by June 30 and attest to the standards of conduct to maintain your professional status and membership.
- 3. Connect, Collaborate and Contribute** with other members committed to advanced leadership in tax-efficient wealth management.

READY TO GET STARTED? PROVIDE YOUR CONTACT INFORMATION:

Name (first/last): _____

Company/Firm Name: _____

Address: _____ City: _____ Province: _____

Postal Code: _____ Email: _____

Home Phone: (____) _____ Cell Phone: (____) _____ Work Phone: (____) _____

ABOUT YOUR DESIGNATIONS & CREDENTIALS:

Help us understand your professional pathway and areas of specialization so we can connect you with the right Society discussions, leadership opportunities, and advanced credentials.

- | | |
|---------------------------------|--|
| <input type="checkbox"/> DMA™ | <input type="checkbox"/> CFA |
| <input type="checkbox"/> DFA™ | <input type="checkbox"/> CFP |
| <input type="checkbox"/> MFA™ | <input type="checkbox"/> CIM |
| <input type="checkbox"/> RWM™ | <input type="checkbox"/> CPA |
| <input type="checkbox"/> MFA-P™ | <input type="checkbox"/> Insurance License |
| | <input type="checkbox"/> Mutual Fund License |
| | Other: _____ |

YOUR PATHWAY TO MEMBERSHIP:

1. ENROL IN A DESIGNATION PROGRAM:

RWM™ Designation **\$1,795**

MFA-P™ Designation **\$1,795**

DMA- Specialist Designation **\$3,970**

2. RENEW AS A LICENSED ALUMNI:

Membership Renewal (By June 30) **\$395**

3. CONNECT, COLLABORATE & CONTRIBUTE:

Society Members are invited to attend Quarterly Meetings in May, August, November and February in Winnipeg, Toronto, Victoria, Mexico (or alternate locations) in addition to live-virtual Distinguished Delegate Experience Events.

Visit learn.knowledgebureau.com/dds for details!

PAYMENT METHOD:

Total Before Tax: \$ _____

Plus Taxes: \$ _____

Subtotal: \$ _____

Total Due: \$ _____

E-Transfer* Visa MasterCard

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REFER A COLLEAGUE:

Name: _____

Company: _____

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I agree to receive course updates, scheduling, certification and transcripts from Knowledge Bureau and communications from the Society of Distinguished Designates™

To learn more about Specialized Credentials from Knowledge Bureau and their curricula, academic policies and procedures, and technology specs go to: <https://www.knowledgebureau.com/site/faq> or call 1.866.953.4769

CE MASTER CERTIFICATES



Lifelong Continuing Professional Development: Customized CE



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CE MASTER MICRO-CREDENTIALS



CONTINUING EDUCATION IN BUSINESS, FINANCE AND TAX

Benefits of Micro-Credentials:

- **Build Specialized Expertise:** Stand out with practical, up-to-date skills for today's industry.
- **Apply Knowledge Fast:** Use new insights immediately in client situations.
- **Advance Your Career:** Earn credentials that fit your schedule and budget.



World-Class Financial Education

What are Knowledge Bureau Micro-Credentials?

Knowledge Bureau Micro-Credentials are compact, specialized courses that deliver targeted expertise in key financial disciplines. They are:

- **Accredited:** Earn CE/CPD credits recognized by Knowledge Bureau, CIRO, MFDA, AIC, Insurance Councils, FP Canada, CPA, and more.
- **Flexible:** 100% online and self-paced—learn anytime, anywhere.
- **Professional:** Courses count toward CE/CPD hours required for re-certification and ongoing professional growth.
- **Recognized:** Digital badges and certificates showcase your achievements and new skills on professional networks.

“CE Master Micro-Collections will be our firm’s first place to enrich our knowledge and skills while earning our required CE credits to maintain our registrations. It is easy to login, find the topics of interest, and navigate through the courses. The special effects (pictures, diagrams, animations) make you stay on-line because Knowledge Bureau makes it fresh and exciting!”

- Tony Mahabir, MBA, CMC, RWM, CIM, RRC, CFP, FP Canada Fellow and President of CANFIN

Earn Your CE Master Micro-Credentials

Knowledge Bureau's **CE Master Micro-Credential** Courses offer bite-sized learning that fits into your busy schedule, provides focused and concrete tax and financial knowledge for immediate application, and serves as a low-commitment way to test new career paths before committing to a fuller industry credential, such as the DMA, RWM or MFA-P Programs offered by Knowledge Bureau.

How Micro-Collections Work

- 1. Choose a Collection or Learning Path**
Explore topics like Finding Financial Freedom or Multi-Generational Wealth Planning.
- 2. Complete Online Modules**
Work through engaging, independent micro-courses on Knowledge Bureau's platform.
- 3. Earn Your Credentials**
Receive certificates, CE/CPD credits, and professional development recognition.
- 4. Track and Advance**
Use the VIP Lounge to monitor progress, download tax receipts, and plan your next steps.

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TAKE A FREE TRIAL! CHOOSE FROM:

- Millennials – Debt Management Strategies
- Business Owners - Calling with Confidence

PREPARE FOR TRANSFORMATIVE CHANGE

Investor-Focused Collections:

Finding Financial Freedom

- Budgeting to Increase Financial Freedom
- The Power of Compounding
- The Time Value of Money
- The Real News about Debt and Interest
- Why Income Tax Matters

Understanding Tax

- Your Tax Filing Rights and Obligations
- Understanding Business Structures
- How Business Income is Taxed
- Understanding the Corporate Balance Sheet
- Minimizing Tax on Death of a Taxpayer

Family Financial Planning Basics

- Planning a Wealth Purpose with A Tax Strategy
- Women and Finance
- Powers of Attorney: Protecting Against Incapacity
- Planning with Seniors
- Planning Retirement Income with Registered Assets

Retirement Planning

- Retirement Planning: How to Envision the Future
- Group Plans: Understanding Employee Benefits
- Understanding Employer Sponsored Plans
- Withdrawing Income from Registered Plans
- Tax Planning with Retirement Income Layering

Leading Your Family Business to Success

- Building Your Brand
- How to Get and Keep Customers
- Scaling Up
- Your Leadership Career
- Your Vision and Goals

Planning for Business Transitions

- Start-Ups: Incorporated or Unincorporated?
- CCPC* Planning: Understanding Shareholder Equity
- CCPC Planning: Understanding Shareholder Remuneration
- Hiring Family: Tax on Split Income (TOSI)
- Intergenerational Business Transfer Rules

Multi-Gen-Focused Collections:

Planning Basics for HNW Investors

- Building Long-Term Net Worth
- The Costs of Wealth Building
- Tax Efficient Investing: Planning for Income and Capital
- Private Corporations: Passive Investment Rules
- Life Insurance and Estate Liquidity

Succession Planning

- Elements of a Successful Wealth Transfer
- Getting the Business Ready for Sale
- When the Business Leaves the Family
- Succession Planning for Key Positions
- Succession Plan Implementation

Multi-Generational Wealth Planning

- Behavioural Finance – Objective-based Family Wealth Planning
- Managing Inter-Advisory Stakeholders
- Planning for Wealth Transition
- Strategic Approaches in Managing Wealth
- Analysis, Accountability and Go-Forward Planning

Asset Management Basics

- Portfolios: Effective Risk Management
- Real Estate: Principal Residence
- Real Estate: Rental Properties
- Cross-Border Issues: Canadians and U.S. Investments
- Currency: Issues in Managing Costs and Risks

Special Situations

- Philanthropists: Building Stronger Communities
- Planning with Trusts
- Executors: Managing Taxes
- Owning Property as a Non-Resident
- US Estate and Gift Taxes

Get Started Today! Become a...



Knowledge Bureau's CE Savvy™ Micro-Courses give financial professionals the specialized knowledge and skills they need to grow their careers and deliver stronger client outcomes. These independent, self-paced online programs provide CE credits, professional development hours, and specialized badges and certificates.

Courses are grouped into Collections or Learning Paths, allowing advisors to focus on key areas such as financial planning, business skills, or investor profiles—offering flexible, targeted professional development that fits busy schedules.

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Earn CE/CPD Credits

PROFESSIONAL PRACTITIONER DIPLOMA

Especially For Full Time Seasonal Pros.
Choose any 2 courses from the DMA course list.

The 2-Course DMA Diploma provides vocational training in tax and business accountancy, offering streamlined entry into the Distinguished Master Advisor (DMA™) program through two focused certificate courses.

Choose from the following areas of specialization:

- Personal Tax Services Specialist
- Corporate Tax Services Specialist
- Accounting Services Specialist
- Small Business Services Specialist

Choose any 2-30 hour Certificate Courses from the Distinguished Master Advisor (DMA) Program.

“I have enriched my knowledge, improved my professional business skills that expands my future career path.”

-Connie H.M. Zhu, DMA - Accounting Services Specialist™, BC

“Very thorough, amazing knowledge. Mix of different speakers, really great to hear from different people and their point of view.”

**- Tracy Khamis, RWM™,
DMA - Tax Services Specialist™, ON**

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CERTIFICATE COURSE SELECTIONS

CE Summit - Advisory Diploma.

Personal Tax Services Specialist

- Professional Income Tax Filing – Level 1
- Professional Income Tax Filing – Level 2
- Filing Proprietorship Returns
- Filing Returns at Death
- Filing T3 Returns
- Retirement Income Planning

Accounting Services Specialist

- Bookkeeping in a Digital World
- Accounting for Multiple Business Profiles
- Advanced Payroll for Small Business
- Budgeting and Forecasting for Small Business
- Understanding Business Valuation
- Accounting for Business Growth & Transition

Corporate Tax Services Specialist

- Corporate Tax Filing Fundamentals
- Tax Planning - Corporate Owner-Managers
- Tax Planning - Incorporated Professionals
- Investment Tax Strategies
- Succession Planning
- Cross Border Taxation

Small Business Services Specialist

- Leading Teams
- Building Business Plans
- Scaling Business Operations
- Understanding Contracts
- Privacy Principles
- Succession Planning

Bonus: Build Your Pathway to the DMA-Specialist Designation:

When you take three Diploma Programs (2 certificate courses in each)



CE SUMMIT ADVISORY DIPLOMA



Especially for Experienced Tax Specialists & Financial Advisors



World-Class Financial Education

Take the Series:

- Four-Full Day, Quarterly Virtual Events & Online Resources
- Cutting-Edge Budget and Tax Form Analysis
- One-Hour Distinguished Delegate Experience: Meeting of the Minds

May 27, 2026	Trust Filing and Estate Planning
September 23, 2026	Issues in Audit Defence
November 5, 2026	Federal Budget Analysis & Year End Tax Planning
January 20, 2027	Advanced Line-by-Line T1 Tax Update Bonus: Printed Desktop Reference!



Everything is Included!

The Live Virtual Summits, Recordings, Online Course and Tax Research Library.



Register Online!

Ask About Group Rates and easy Instalment Plans. Register at least 2 weeks before event dates.

"There is a lot to learn about finances and Knowledge Bureau provides us with in depth insights. the evergreen notes are invaluable and very thorough. I appreciate the fact that the presentations are recoded and I can review them at my own pace and time."

– Robert D'Alessando

"KB always does a phenomenal job of choosing presenters with in-depth knowledge & the ability to convey that knowledge."

– Brenda Anderson

Accreditation: Earn 20 CE Credits per CE Summit; third party accredited. Take the series to earn your CE Summit - Advisory Diploma

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Canada's Tax Preparers & Wealth Advisors

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Graduation, Rewards & Relicensing
Business Builder Network



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POST-GRADUATION, EXPLORE:

- VIP Affinity Awards Program
- Relicensing Program
- Awards Program: FDFS™ & The Acuity Conference for Distinguished Advisors

GRADUATION, AWARDS & RE-LICENSING

VIP AFFINITY PROGRAM

At Knowledge Bureau we celebrate our Graduates, who have successfully completed their course accreditation requirements!

Join the exclusive club of grads to receive your VIP Graduate Rewards through the VIP Affinity Program.

VIP Tuition Savings

Grads save **\$100** on their next KB enrolments.

Designates save **\$200** off tuition fees and can use exclusive rates for team training. Some limitations apply.

FDFS™ save **50%** off regular tuition fees.

Designates must qualify for the VIP Affinity Program each academic year by enrolling in a new online course or program by June 30 or paying the annual Designate Recertification Fee (with included access to the CE Master Micro-Credentials Program).

Designates, did you know your whole office can benefit from your VIP Status?

RELICENSING PROGRAM FOR DESIGNATES

Relicensing the use of your designation marks is an annual process. The academic year for these purposes is July 1 to June 30.

Annual Relicensing Deadline: June 30, 2026

New Designate Relicensing Process in 2026:

In 2026, relicensing of Designation marks will move to a \$395 annual fee, which includes access to your choice of 15 CE Master micro-courses.

Designates may also explore other approved educational options to meet their annual CE requirements.

New for 2026! Relicense as a CE Master



Bonus with your annual relicensing fee: choose 1-collection of 15 Micro-Courses in our CE Master Program.

Program Details Online at: learn.knowledgebureau.com/mastery or see detailed program brochure.



LEARN MORE:

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Join Us for An Annual Awards Celebration at the Acuity Conference for Distinguished Advisors Featuring:

- Our Distinguished Designates and Graduates
- Fellows of Distinguished Financial Services (FDFS™)
- Special Achievements of Individuals and Firms

ACUITY AWARDS PROGRAM

ACUITY CONFERENCE (DAC)

Celebrate your achievements and a celebration featuring our Designates and FDFS™ at the 2026 Acuity Conference for Distinguished Advisors (DAC) and reach new professional heights among the stars of your industry.

Join Us for the Acuity Conference Experience: November 22-24, Victoria BC

**Theme: The North Star
Strategic Direction & Value Reflection**

- Awe-inspiring education in a pristine setting
- Participate and deliberate in thought leadership
- Connect & collaborate with like-minded professionals

Mark Your Calendar:

- **Nov. 22** - Opening Reception & Grad Awards
- **Nov. 23** - Educational Sessions & Gala Event
- **Nov. 24** - Educational Sessions (Half Day)

New Grads & Honourees Attend at Team Member Rates. Delegate, Team Member & Companion Registration Options Available

FDFS™ AWARDS PROGRAM

The Fellows of Distinguished Financial Services are awarded the FDFS™ Certification mark based on a criteria of demonstrated thought leadership and innovation in sharing knowledge through education, writing, lectures, coaching, leading and mentorship relating to tax, accounting, financial literacy, economic, wealth management and financial services.

FDFS™ meet annually at the Acuity Conference for Celebration, Leadership and Networking.

Meet the Distinguished Fellows!

Explore the FDFS™ Directory at learn.knowledgebureau.com/fdfs

Interested in Joining the Fellowship?

Learn more about how to become a faculty member and earn the FDFS™.

Request a KB Faculty Application today: faculty@knowledgebureau.com



LEARN MORE:
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2026 ACUITY CONFERENCE for Distinguished Advisors

November 22-24, Victoria B.C.



THE NORTH STAR: Strategic Direction & Value Reflection

- Awe-inspiring education in a pristine setting
- Participate and deliberate in thought leadership
- Connect & collaborate with like-minded professionals

Come to the Only Multi-Disciplinary Conference
For Tax Accountants & Financial Advisors

THE ACUITY CONFERENCE DIFFERENCE



The Education

It's the key differentiator: 20+ thought leaders share immediately implementable strategies and observations.



The Experience

Set your sights on the North Star: the guiding principles for decisions and actions aligned around clients' needs.



The Networking

Collaborate with focused and forward-thinking professionals committed to shaping the future of the industry.

"It is important to be clear on why we attend events and the impact that will have on our professional lives and our clients lives. Leaders know where their time is best spent; solving the most important problems and connecting with likeminded professionals that share the same vision and desire for positive impact in their work."

DAC gives you the opportunity to get the inside perspective from other thought leaders and ask the right questions to get the critical insights for your success."

- Stefanie Keller, CFP, RWM™, FDFS™ & Acuity 2025 MC

REGISTER ONLINE



Accredited:

15 KB Credits. Submitted for approval by third parties: AIC, ICM, FP Canada, MFDA, and CIRO - Investment Dealer Division.

"There is a wealth of relevant information, not to mention networking opportunities, that encompass all financial advisory fields and topics. And it is also a lot of fun!"

- Maureen Carse, Delegate

"Everything was well-organized and delivered well, with heart as well as the slide decks!"

- Jan Fraser, Sponsor

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CONFERENCE REGISTRATION FORM

TUITION FEES REGISTER BY EARLY-BIRD DEADLINES TO SAVE!

	Regular Tuition	Individual	New Grads/Team Member* (Accredited)	Companion (non-accredited)
	\$2,500		\$1,995	\$695
Save up to 36%!				
June 30		\$1,795	\$1,450	\$550
Sept. 30		\$1,895	\$1,595	\$595
Oct. 30		\$1,995	\$1,695	\$695



Registration Form: Please print legibly and scan to learn@knowledgebureau.com or register online (see below)

Full Name :

Designations:

Office Email : Mobile Phone:

Personal Email: Call - Office:

Company

Companion:

Name: Designations:

Dietary & Mobility Requests:

Dietary:

Mobility:

Companion:

Tuition Payment Options:

Credit Card Payment

Card No:

Expiry: CVV

Signature:

Visa

Mastercard

AMEX

E-Transfer

For details and enrolment policies see:
<https://www.knowledgebureau.com/site/faq>

THE DETAILS:

Delegates: Opening Reception & Awards Dinner & Gala Events, Educational Sessions & Refreshments, Tuition Fee Receiving, CE/CPD Accreditation, Certification.

***New Grads/Team Member:** Special pricing for new graduates or team members. Accredited.

Companion Registration: Non-Accredited.

Not Included: Meals outside stated conference events, hotel rooms, transportation, travel and personal travel and liability insurance.

Check out hotel details at:
learn.knowledgebureau.com/acuity

Tuition For:	
Individual:	\$ _____
Team Member:	\$ _____
Companion:	\$ _____
Table:	\$ _____
Total Fees:	\$ _____
Taxes:	\$ _____
Total:	\$ _____

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All taxes extra (GST # 885004713RT00001)

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- Knowledge Bureau Report Weekly Newsletter
- Real Tax News Podcast

KNOWLEDGE BUREAU NETWORK

Financial Issues & Answers For Everyone

KNOWLEDGE BUREAU REPORT

Knowledge Bureau Report (KBR) is a bi-weekly publication. We cover and interpret the most current issues in the tax and financial services landscape, and provide practical applications in tax, investment, retirement, succession, estate and business planning.

About the Knowledge Bureau Network

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 over 1 million views annually. The average time on site is just under 5 minutes, and the open rates for our communications average 17-20%.

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

REAL TAX NEWS PODCAST

Real Tax News Podcast (RTN) delivers practical, timely insights on Canadian taxation, wealth management, and financial planning—focused on what professionals need to know now. Each episode with Evelyn Jacks and Special Guests, breaks down current tax issues, legislative changes, and planning strategies into clear, actionable guidance that supports defensible advice and better client outcomes.

Designed for tax and financial professionals, Real Tax News connects technical updates to real-world implications, covering topics such as personal and business tax planning, compliance risks, succession and estate considerations, and emerging industry trends. The podcast supports ongoing professional development by helping listeners stay informed, confident, and prepared in a rapidly evolving tax and regulatory environment.

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MEDIA KIT

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



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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™

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SIX OPPORTUNITIES TO BUILD YOUR BRAND AND REACH NEW AUDIENCES

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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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2026 ACUITY CONFERENCE For Distinguished Advisors

November 22-24, Victoria B.C.



BECOME A SPONSOR!

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Multi-Disciplinary Educational Conference

- **Engaged Audience:** Reach 150 tax and financial service influencers.
- **CE Credits:** Earn up to 15 CE Credits for you and your team from KB and third-parties AIC, ICM, FP Canada, MFDA, and CIRO - Investment Dealer Division.
- **Networking:** Build strong inter-advisory relationships with top DAC Faculty and advisors.

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Put your brand and value proposition in front of this highly-engaged audience to introduce your new strategies to their successful businesses.

All partners gain national exposure throughout the year in Knowledge Bureau Report, delivered weekly to close to 17,000 advisors from coast to coast, website presence, on-site display, signage, introductions throughout the event, national media coverage through our exclusive media partner and post-event reporting.

Complimentary registrations are included and vary by Sponsorship level.

"The Acuity Conference for Distinguished Advisors is one of the premier annual professional development and networking conferences for financial advisors practicing in Canada. Speakers address a broad range of relevant topics. Financial and tax experts convey invaluable information and provide insight into current issues and events challenging our clients and advisors alike. The DAC is an excellent venue to share your thoughts and questions, while gaining a breath of knowledge to better serve your clients."

-Larry H. Frostiak,
FCPA, FCA, CFP, TEP, RWM™, FDFS™

Partnership Levels:



Title

Your brand and leadership presence on stage for a Keynote Session and host the Gala Event.



Platinum

Lead an Educational Session as a Speaker and host one Ceremony or Reception.



Gold

Host an Educational Session or Discussion Panel.



Silver

Host a Networking Event or Reception.



Biz Mall Sponsor

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- Jack Wozniak, Financial Professional

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Full Name :

Designations:

Office Phone: Mobile Phone:

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Select Your Partnership Level	<input type="checkbox"/> Title	<input type="checkbox"/> Platinum	<input type="checkbox"/> Gold	<input type="checkbox"/> Silver	<input type="checkbox"/> Bronze
Regular Sponsor Fees:	\$15,000	\$12,500	\$10,500	\$7,500	\$3,500
Early-Bird Fees to April 15	\$14,250	\$11,995	\$9,995	\$6,995	\$2,995
# Of Complimentary Tickets	5	4	3	2	1
\$ Value of Included Tickets:	\$8,975	\$7,180	\$5,385	\$3,590	\$1,795 Speaker Only
Pre & Post-Event					
Multi-faceted advertising in social media, KBR*, websites, eblasts and the DAC Report.	X	X	X	X	X
At Event					
Keynote Session & Host the Gala Event (1 Sponsor)	X				
Educational Session & Host 1 Ceremony or Reception (Graduate Ceremony, First-Timer's Club, Alumni Club)		X			
Educational Session or Discussion Panel			X		
Host 2 Mimosa Breaks OR (1 Sponsor)				X	
Host 1 Reception: First-Timer's Club, Alumni Club, or any other event you can dream up!	X			X	
Host your organization's booth	X	X	X	X	X
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*Each sponsor receives one article exclusively featuring their session in Knowledge Bureau Report. Company and speaker bios must be received with payment. Event Marketing featuring new sponsors will start within 30 days of completed payment.