

Knowledge Bureau's Tax Training School

Especially for Tax, Accounting & Financial Professionals



Diploma: Advanced Family Tax Compliance

Join us for four full-day CE Savvy™ Summit virtual events each year, and earn CE Credits. Take all four in sequence and earn a prestigious Diploma.

CE Savvy™ Summit Events:

Join Knowledge Bureau President, Evelyn Jacks and Special Guest Instructors for live virtual events, each featuring a comprehensive online course with educational components to enhance your professional reference library, including recorded presentations. Mark your calendar now:

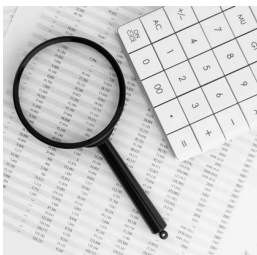


Asset Management, Retirement & Estate Planning

May 21, 2025

Early-bird deadline: May 15

The time for succession planning is now! Learn the latest techniques in retirement and estate planning for uncertain times.



Audit Defence

September 17, 2025

Early-bird deadline: Sept.15

Help clients inflation-proof their wealth by mitigating tax audit risk.



Year-End Tax Planning

November 5, 2025

Early-bird deadline: October 15

What matters is what you keep! The focus is on investors and small business owners.



Advanced Personal Tax Update

January 21, 2026

Early-bird deadline: Jan. 15

Shake out the cobwebs and drill down on the detailed tax theory or "dark horses" as well as all news from CRA and Finance Canada for filing returns during the upcoming tax season.

Student Experiences:

"Good, current, useful, practical information that can be implemented/practiced immediately; presented in a cohesive and understandable format; presenters know their stuff and share info well."

– Barb Rice

"Having the requirements about the new CGIR and the proposed sweeping powers of the CRA presented succinctly with concrete examples was so helpful . . . that is why I would recommend CE Summits and Knowledge Bureau to others. I found the topics presented to be so relevant and informative."

– Stewart Grant

Tuition Fees

Diploma: Advanced Family Tax Compliance

☐ **Diploma Program:** **\$340** Each Event...save 57%

Certificate: Individual Live, Virtual Events

CE Savvy Summits:

Regular Tuition: \$790

Early-Bird Rates*

Each Event

After Deadline

- ☐ **New Student** **\$690**
- ☐ **Designates** **\$490**
- ☐ **Graduates** **\$590**
- ☐ **Team: 2 or more** **\$390**

- ☐ **New Student** **\$790**
- ☐ **Designates** **\$590**
- ☐ **Graduates** **\$690**

All taxes extra. Additional VIP Tuition reductions do not apply to the fees above. For Curriculum, Pre-requisites, Academic and Refund Policies, Standards of Conduct and Procedures go to:
<https://www.knowledgebureau.com/site/faq>

Accreditation:

Earn 15 CE Credits per event from Knowledge Bureau. Approval for CE Accreditation from third parties includes ICM, IIROC, MFDA, FP Canada. See selected event for specific accreditation details.



Rookie & Technical Tax Schools

Especially for Rookie Tax Preparers & Financial Advisors Who Need to Know Tax



Diploma: Personal Tax Preparation

With a focus on how to file T1 tax forms, this new 4-part training series is designed to help accommodate late form releases by CRA and help firms with continuous onboarding of new seasonal staff. Take all 4 to earn your Diploma.

CE Savvy™ Mini Summits:

These fast-paced half day sessions (8:15 - 12:30 CT) are led by faculty members with years of experience doing thousands of returns in the tax industry in Canada. Earn 5 CE Credits, access the recorded sessions, and as an additional bonus, you'll be enrolled in *Canada's Income Tax Fundamentals Course*!



Rookie Tax School: Families, Employees & Investors January 29, 2025

Early-bird deadline: Jan. 15

Learn how to confidently file simple tax returns at a high level with a focus on tax form filing techniques,



Filing Capital Gains Forms February 12, 2025

Early-bird deadline: Feb. 1

File returns with capital gains transactions based on the latest tax changes for the current tax filing year.



Families & Their Real Estate Feb 19, 2025

Early-bird deadline: Feb. 1

File simple tax returns with a focus on filing the tax forms required for transactions families record on their T1 returns, including the use of their principal residence.



Filing Small Business Returns February 26, 2025

Early-bird deadline: Feb. 1

Confidently file T1 returns that include unincorporated small business income based on the latest tax changes.

Student Experiences:

"The CE Summits are packed with the most relevant information I need to keep my clients informed and to help them plan ahead. The speakers are knowledgeable and the delivery of the content is well done."

-Kareen Rekowski

"Effective learning to cover all aspects of taxation, wealth management, and retirement planning."

-Cecilia Ng

Tuition Fees

Diploma: Personal Tax Preparation

All 4 Mini Summits - Register by Jan. 29

☐ **Diploma:** **\$250** Each Event - Save 37%

Certificate: Individual Half-Day Events

Mini Summits

☐ **Early-Bird** **\$295** ☐ **Regular Tuition: \$395**

All taxes extra. Please note: VIP Affinity reductions do not apply to Mini Summit tuition prices.

Accreditation:

5 KB for completion of the whole CE Savvy™ Mini Summits Program. Submitted for approval with third parties.

Bonus! Canada's Income Tax Fundamentals Course is included with all Mini Summits

File Simple Returns Confidently! This 20-hour course is perfect for anyone new to personal tax filing and especially valuable for career development in the tax preparation or financial services.