

# 2026 TAX PREPARATION & FINANCIAL PLANNING SUMMITS



Certificate Training for New & Experienced Advisors

**Register Online!**

[learn.knowledgebureau.com](https://learn.knowledgebureau.com)

Or Call **1.866.953.4769** for group rates.



World-Class Financial Education

## Two Distinctly Different Programs for Your Workplace Training

**Program 1**  
ESPECIALLY FOR NEW ENTRANTS  
TO INCOME TAX PREPARATION

### KB T1 Tax Prep School

Earn Credentials as a Certified Income Tax Preparer

**START THE ONLINE COURSE ANYTIME 24/7**

Then Take the Live-Virtual Peer-to-peer instruction in February 2026.

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

*“All knowledge that was presented in this CE Summit empowers my practice as a tax preparer.”*  
- Eva Ferianec

**Program 2**  
ESPECIALLY FOR RETURNING TAX & FINANCIAL SPECIALISTS

### Advanced Tax Planning & Compliance Series

Earn your CE Summit - Advisory Diploma

**THE SERIES STARTS INCLUDES LIVE VIRTUAL EVENTS IN JANUARY, MAY, NOVEMBER & SEPTEMBER**

Includes Expert Instruction in Personal, Corporate, Cross-Border, and Trust Tax Preparation and Planning.

*“I get a wealth of information in the courses and during a Summit.”*  
- Melissa Wenderski

**REGISTER NOW!**

[learn.knowledgebureau.com/cesummits](https://learn.knowledgebureau.com/cesummits)  
1.866.953.4769

Check out the detailed instruction online, or turn the page and apply by phone.

# 2026 T1 TAX PREPARATION SCHOOL



**Train New Staff or Earn Another Income Stream**

**Earn Credentials as a Certified Income Tax Preparer:**

**Step 1:** Start Your Comprehensive 8-Chapter Online Course

**Step 2:** Take the 4 Half-Day Virtual Events with Dynamic Instructors and Peers



World-Class Financial Education

## Step 1: CANADA'S INCOME TAX FUNDAMENTALS COURSE



In just 20 hours, learn Canada's tax system - income reporting, deductions, credits, capital gains, rental income, and tax software. Learn to confidently prepare dozens of true-to-life case studies using well-known professional tax software.

**Everything is Included in Your Tax Deductible Tuition Fees!**

### Tax Prep School Bundle *(best value!)*

- ✓ 20-Hour Online Course
- ✓ 4 Mini Summits

**\$995** Save 64%

### Fundamentals Course Only

- ✓ 20 Hour Online Course

**\$695** Save 13%

To sessional deadlines

### Individual Events Only

- ✓ Mini Summits

**\$395** Save 20%

To early-bird deadlines

VIP Grads & Designates Save More on Individual Events & Course

**Accreditation:** Earn 5 CE Credits per CE Summit, 20 CE Credits for the Fundamentals Course; third party accredited.

## Step 2: 2026 MINI CE SUMMITS

Join four half-day virtual CE Mini Summits for practical training, certification, and career-building skills. **Sign up by January 31 for early-bird rates.**



### February 4, 2026 Families, Employees & Investors

Introduction to Canada's Tax System - learn to prepare simple tax returns.

Featuring the RWM™ Experience: Open Forum



### February 11, 2026 Calculating Capital Gains

Learn how to treat asset acquisitions and dispositions on a T1.



### February 18, 2026 Families & Real Estate

Focus is on family tax credits and deductions, principle residences and rental income.



### February 26, 2026 Small Business

Learn to prepare tax returns for Proprietorships including capital cost allowance schedules.

**REGISTER NOW!**

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1.866.953.4769

Pre-Eminent Professional Development for  
Canada's Tax Preparers & Wealth Advisors



# 2026 ADVANCED TAX PLANNING & COMPLIANCE SUMMITS



**QUARTERLY FULL-DAY EVENTS**  
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 RWM™-Experience: Meeting of the Minds

May 27, 2026	Trust Filing and Estate Planning
September 23, 2026	Audit Defence Strategies
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.

## Early Bird- Tuition Savings: Register 2 Weeks Before the Event!

**Take the Full Series** (best value - register anytime!)

- ✓ 4 Full-Day Summits
- ✓ 4-5 Hour Online Courses

**\$397.50** Save 50%

Best Value tuition applies for all registrations.

**Individual Events** (Act by Early-Bird Deadlines)

- ✓ 1 Full-Day Summit
- ✓ 1-5 Hour Online Course

**\$695** Save 12%

VIP Grads & Designates Save More!

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

## REGISTER NOW!

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