Tax Strategies for Financial Advisors

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Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Financial advisory firms
- Independent financial advisors
- Financial planners
- Tax and accounting professionals

- Advise affluent families seeking tax-efficient investment planning
- Provide holistic wealth management advisory services to your clients
- Certified course approved for 30 FPSC-approved CE credits

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- Individualized study plans, instructor support
- 24/7 access to online lessons, quizzes
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- Testing, accreditation and certification
- Easy pay plan customized to fit your budget
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How to Enrol in Your Self-Study Course Today

1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

Knowledge Bureau®
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Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

TAX STRATEGIES FOR FINANCIAL ADVISORS

Tax, financial planning and wealth management competencies are required to fund income and capital accumulation goals derived from investments. The advisor must use a strategy and a process geared to preserving, growing and transitioning wealth tax efficiently to the next generation, throughout the lifecycles of individuals within a family.

CONTENT DESCRIPTION & KEY CONCEPTS

This course covers a strategic and tax efficient investment income planning process which will result capital accumulations in the right hands within individuals in the family. The objective is to earn investment income tax efficiently, split it with family members and avoid tax erosion of the capital at transition times. The course includes all relevant recent tax changes including: UCCB enhancements, The Family Tax Cut, Changes to TFSA contribution limits, Changes to the Capital Gains Deduction.

CERTIFIED SKILLSETS YOU WILL LEARN

The student will:

- Be conversant with recent tax changes relating to a variety of investment opportunities, understanding strategies and ordering rules using tax free, tax deferred and taxable income
- Proficiently use a series of assessment tools around which to structure the client's pre- and post-tax investment income needs and monitor ongoing results
- Learn how to "manage the tax return" by being familiar with tax free zones, clawback zones and marginal tax rates
- Provide specific investment income planning approaches for a variety of taxpayer profiles including young families, students, business owners and retirees

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

TABLE OF CONTENTS

Study Time: 30 hours

STEP 1: STUDENT IDENTIFICATION

Name ______ Returning Student ID # ______

Company ______

Address ______

City ______ Province ______

Postal Code ______ Email ______

Phone with Area Code ______ Fax ______

Referred By ______ Current Designations/Licensing ______

STEP 2: TUITION FEES

- ☐ **Single Course Tuition Fee** **$795**
- ☐ **Electronic Textbooks** **No Extra Charge**
- ☐ **Hard Copy Textbooks and Delivery** **$ 95**

OR

- ☐ **Choose Certified Skills Diploma or Designation Program and save**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

STEP 3: PAYMENT PLANS

☐ **Full Payment Plan** (Branch Office study groups save 10%):

Number of Courses: _______ **A** x fee from Step 2 = **B** below

TOTAL TUITION FEES: $______________B

Hard Copy and Delivery (see step 2) $______________C

SUBTOTAL (B + C) $______________D

GST/HST (885004713RT001) $______________E

TOTAL DUE (D + E) $______________F

☐ **EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

☐ **CREDIT CARD:** ☐ Visa ☐ MC ☐ Amex Expiry Date ___ / ___

Card Number ______________________________

Name on Card ______________________________

Signature ______________________________

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

☐ Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.