



# The Distinguished Financial Advisor Designation

Take Your Tax Practice to the Next Level with  
an Advanced Professional Development  
Program by Self Study.

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CANADA'S LEADING EDUCATOR IN TAX AND FINANCIAL SERVICES

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**When you enrol in one of two 6-course DFA programs**

Designed Especially for Experienced Tax, Bookkeeping and Accounting Advisors who seek the leading edge in personal, corporate, trust and GST information to better serve their clients, and update or train returning and new seasonal staff

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courses, featuring  
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software included.**

Contact us today:

Toll Free: 1 866 953-4769 Fax: 204 953-4761 E-mail: [reception@knowledgebureau.com](mailto:reception@knowledgebureau.com) or enroll online: [www.knowledgebureau.com](http://www.knowledgebureau.com)

# The Distinguished Financial Advisor Designation

The DFA Designation signifies the highest professional services by experienced, qualified practitioners in providing tax preparation, tax planning, bookkeeping, payroll and managerial accounting services to individuals and business clients, as a result of continued excellence in ongoing professional development. Each self study course listed below features 30 hours of continuing education.

## SELECT YOUR PROGRAM AND COURSES

**DESIGNATION PROGRAM:** Take four self study courses from a specialist stream plus any other two courses for a total of six.

**CERTIFICATION PROGRAM:** Take any individual certificate course for continuing education credit.

For CE accreditation details from various associations and regulators, as well as detailed course descriptions, and components see [www.knowledgebureau.com](http://www.knowledgebureau.com)

### DFA Designation Program 1 Tax Services Specialist

#### REQUIRED SELF STUDY COURSES:

- Advanced Tax Preparation and Research
- Tax Preparation for Proprietorships
- Introduction to Corporate Tax Preparation
- Use of Trusts in Tax and Estate Planning

#### OPTIONAL COURSES – ANY TWO OF THE FOLLOWING

- Introduction to Computer-based Personal Tax Preparation
- Cross Border Taxation
- Insurance Strategies for Small Business Owners
- Death of a Taxpayer

### DFA Designation Program 2 Certified Bookkeeping Specialist

#### REQUIRED SELF-STUDY COURSES:

- Managerial Accounting for Professional Bookkeepers
- Advanced Bookkeeping for a Selection of Business Profiles
- Advanced Business Issues for the Professional Bookkeeper
- Tax Planning for the Corporate Owner-Manager

#### OPTIONAL – ANY TWO OF THE FOLLOWING:

- Basic Bookkeeping for Business Featuring Simply Accounting
- Advanced Computer-Based Payroll for Professionals
- Introduction to Computer-based Personal Tax Preparation
- Introduction to Corporate Tax Preparation

## Self Study Application Form

Toll Free: 1 866 953-4769 Fax: 204 953-4761 E-mail: [reception@knowledgebureau.com](mailto:reception@knowledgebureau.com) or enroll online: [www.knowledgebureau.com](http://www.knowledgebureau.com)

**CERTIFICATION OPTION** – choose any 1 – 5 courses

1 course @ \$475.00 each .....	\$ 475.00
2 courses @ \$415.63 each .....	\$ 831.26
3 courses @ \$403.75 each .....	\$ 1,211.25
4 courses @ \$380.00 each .....	\$ 1,520.00
5 courses @ \$356.25 each .....	\$ 1,781.25

**YOU SAVE**

12.5%  
15%  
20%  
25%

**DESIGNATION OPTION** – choose Program 1 or 2

6 courses @ \$332.50 .....	\$ 1,995.00
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**BEST VALUE**

30%

TOTAL FOR ALL COURSES .....	\$ _____
SHIPPING AND HANDLING (\$16.00 per course) .....	\$ _____
SUBTOTAL .....	\$ _____
VOLUME DISCOUNT(\$100.00 or \$50 off for SEPs*/Alumni) .....	\$ _____
SUBTOTAL .....	\$ _____
GST #88500 4713 RT0001 .....	\$ _____
TOTAL .....	\$ _____

Name	Company	
Address	City	Province
Postal Code	E-Mail	
Phone	Fax	Current Designations/Licensing

**\*STRATEGIC EDUCATION PARTNERS OR COURSE ALUMNI**

Become a Strategic Education Partner (SEP) with The Knowledge Bureau and receive an additional \$100 discount for each team member who enrolls in our Designation Program (6 courses chosen) or \$50 for single course purchases.

**MONEY-BACK GUARANTEE**

If you are not satisfied upon review of your self study courses, your money is refunded-no questions asked-provided, however, that you contact us within one week of receipt of materials; the program must be returned in saleable condition. This makes your enrollment with us risk free. See our course catalogue for more detail at [www.knowledgebureau.com](http://www.knowledgebureau.com)

**PAYMENT METHOD:**  Visa  MasterCard  Cheque<sup>†</sup>

Credit card no: \_\_\_\_\_

Exp. date: \_\_\_\_\_

Signature: \_\_\_\_\_

Unless circle is checked, I provide consent for you to store my contact information and contact me about future educational opportunities.

\* SEPs are sponsors of the Distinguished Advisor Conference. For details see [www.knowledgebureau.com/dac](http://www.knowledgebureau.com/dac). Alumni are self study course graduates.

† If paying by cheque, submit enrollment application form and cheque to: The Knowledge Bureau, Box 52042 Niakwa Postal Outlet, Winnipeg, MB R2M 0Z0