

Learn a critical financial life skill and help others in your community as a

DMA - Business Transition Services Specialist™

Future-Focused Tax & Financial Planning



Earn new Specialized Credentials as a Distinguished Master Advisor™

Why Become a DMA?

To professionally advise family business owners on business transitions, this professional must understand tax planning across personal, corporate, and trust structures. Become a DMA and help solve business growth and transition opportunities with confident knowledge.

Who Should Take the Program?

Tax and financial advisors working with incorporated business owners, clients who are building or transitioning their businesses. Whether you're building one or transferring one to a successor, you will need unique financial advice from specialists in the tax or wealth management services.

Courses:

- Advising Family Business
- Tax Efficient Asset Transition Planning
- Use of Trusts in Tax & Estate Planning
- Tax Planning for Corporate Owner-Managers
- Tax Planning for Incorporated Professionals
- Understanding Business Valuation

Start a New Career with marketable skills in:

- Financial Planners
- Accounting & Tax Practitioners
- Wealth Managers
- Insurance Advisors
- Owner-Managers

Start today - Study online - Everything is included!



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



Student Testimonial:

"What surprised me about the courses was the outcome. My new understanding of the mechanics made it significantly easier for other advisors to implement my advice because I was confident I knew how to explain it"

- Ian Wood, DMA™



1.866.953.4769



learn@knowledgebureau.com



www.knowledgebureau.com

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Advising Family Business

It is widely accepted that the majority of family businesses do not survive past the first or second generation. This represents an unfortunate loss, not only for the family that relies on this income for financial stability, but also for Canada’s economy. Family businesses have unique opportunities and challenges, and require advisory assistance with this in mind. With this course, you will learn how you can help clients beat the succession odds by better understanding the planning process today.

Scope of the course:

- Understanding the Family Business
- How to Work in Alignment with Your Family Business Clients
- Developing a Shared Vision
- Understanding Family Dynamics and Systems
- Planning and Real Wealth Management
- Advisory Products & Services
- The Priorities Pyramid
- The Succession Mapping Process
- Structuring Retirement Income
- Advising Family Businesses

Tax Efficient Asset Transition Planning

This course covers a holistic retirement income planning process. You will acquire the knowledge to do a proper assessment of client vision and goals for retirement and engage them in a consistent process for addressing the three trigger questions that cause financial decision-making—life, financial, and economic events.

Knowledge Journal Topics:

- Methodology: Tax-Efficient Retirement Income Planning
- First Steps: Helping Clients Envision the Plan
- Tax Changes Relating to Retirees
- Managing Government Income Sources
- Managing Canada Pension Plan
- Planning with Tax-Assisted, Self-Funded Sources
- Foreign Pensions and Non-Registered Accounts
- Tax-Efficient Retirement Income Planning for Employees - Part 1
- Tax-Efficient Retirement Income Planning for Employees - Part 2
- Planning for Post-Retirement

Use of Trusts in Tax & Estate Planning

For most Canadians, and many of their advisors, the use of trusts in tax and estate planning is in focus for higher net worth families with complex business or financial dealings; no concern, really, until someone dies. Most people understand that upon death of a taxpayer, it is possible to have assets held in trust until distribution or for income or capital distribution, depending on the deceased’s wishes in the Will.

Knowledge Journal Topics:

- Recent Changes to the Taxation of Trusts
- Basic Trust Mechanics
- Trusts as Mechanisms to Exert Control
- Basic Tax Treatment
- Testamentary Trusts
- Inter Vivos Trusts
- Charitable Remainder Trusts
- Alter Ego & Joint Partner Trusts
- Insurance and RRSP Trusts
- Spousal Trusts
- Trusts for Disabled People



Level 2 Courses: Mastery & Specialization

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

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

Knowledge Journal Topics:

- The Taxation of Business Income
- Understanding Family Compensation
- Income Tax Treatment of Salary
- Income Tax Treatment of Dividends
- Other Compensation Issues
- Income Splitting, Kiddie Tax
- Issues in Using a Holding Company/Trust
- Registered Deferred Income Plans
- Unregistered Deferred Income Plans
- Planning Pitfalls
- TOSI

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.

Knowledge Journal Topics:

- Tax Rules for Professional Corporations
- Incorporated vs Non-Incorporated Businesses
- Corporate Structures
- Shareholder Remuneration
- Corporate Shareholder Integration Theory
- Using the PC for Family Benefits
- Getting the Business Ready for Sale
- Selling the Professional Practice
- Succession Planning: Top 10 Tips

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.

Knowledge Journal Topics:

- Introduction to the Notion of Value
- Valuation Approaches: Company Specific
- Valuation Approaches: Market-Based
- Valuation Considerations: Issues that Could Impact Value
- Business Transactions: Preparation Stage
- Business Transactions: Negotiation and Due Diligence Stage
- Business Transactions: Closing and Transition Stage
- Value and Investment Transactions
- Financial Performance and Valuation



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“Our team of educational consultants and instructors make all the difference. We are always by your side as you study in the convenience of home or office. We want you to make the best educational decisions for your time and money and we are here to help.”

- Evelyn Jacks, President of Knowledge Bureau



Register Now to Earn Your Certificate of Distinction

Whether you take one certificate course at a time or the entire Distinguished Master Advisor Program, you'll embrace new professional skills and position yourself for new growth in earnings. Many successful tax accounting and financial advisory firms have incorporated the DMA Distinguished Master Advisor program into their team with great results.

Don't be left behind!

