

MFA-P Designation Program

Earn new Specialized Credentials in strategic philanthropic planning for individual and family legacies



Lead High Value Conversations with Clients About Legacy Planning

Strategic Planning for Charitable Giving

The MFA-P™ has specialized professional credentials to enable high-value planning for individual or family legacies. In this dynamic program, learn to have highly satisfying conversations with clients sooner in your relationship, address their big fears: that gifts will not be used wisely or according to personal passions and wishes. Then, provide a consistent process for giving solutions with investments that are tax-efficient, during lifetime and as part of a personal or family legacy.



“CAGP is excited about realizing a long-time dream to offer a designation to advisors who want to work more closely with charitably-minded clients to have community impact in mind when planning their finances, retirement and succession.”
-Ruth MacKenzie, President and CEO, CAGP



“All of our partners and faculty members have worked hard to develop a designation program that will be of particular value to advisors working with high net worth clients, as well as those who put social impact at the top of their investment priorities.”
- Evelyn Jacks, President of Knowledge Bureau



“I am looking forward to working with firms and advisors to engage in this important industry designation that will add further trust and credibility to the work of advisors, and impact on charities in Canada.”
- Brad Offman CEO of Spire Philanthropy.

Who Should Take the MFA-P™ Program?

Become a certified professional in the evolving field of philanthropy. Build trusting relationships with your clients and help them make a difference in the world through charitable giving.

Start a New Career with marketable skills in:

- Accounting and Tax Practitioners
- Estate Planning Lawyers
- Gift Planning Advisors
- Trust Officers
- Wealth Advisors
- Financial Planners
- Insurance Advisors



There is an emerging investment trend increasingly important to investors of all ages: strategic philanthropy. But few advisors deliver what clients want: how to integrate personal values with tax and financial plans. Now you can address this need by earning your MFA-P™ Designation.

Study Online - Everything is Included!

The three online courses in the program focus on teaching advisors to develop plans with individuals and families looking to support their favourite charities in a strategic fashion, using a practical approach featuring real-life case studies and cutting edge calculators and a comprehensive online research library to stay up-to-date with tax changes.

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THE MFA-P™ provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies
Learn to have highly satisfying conversations with clients about charitable giving

Introduction to Strategic Philanthropy

Learn how to tap into clients' philanthropic goals. In the process, increase opportunities to build trust by understanding clients' values and critical personal causes. Engage and get multiple stakeholders on the same page, with objectives for deploying a successful charitable giving strategy. Obtain a precise understanding of how to integrate the tax aspects of charitable giving. In this course you will learn how to plan and integrate your clients values with new technical expertise.

Six modules cover:

- Why Families Give
- The Role of the Advisor
- Personal Tax Aspects of Charitable Giving
- Introduction to Canadian Income Tax
- Ways to Give - Assets Other Than Cash
- Deferred Gifts - Tax Aspects
- What a Successful Plan Looks like

Understanding the Charitable Sector

Obtain a deeper knowledge of emerging philanthropic and fundraising trends. Learn to guide clients' giving objectives towards the investment options and charitable structures that ensure gifts will be used wisely and according to their wishes. This course provides foundational knowledge for navigating and assessing the charitable landscape. Students will be equipped to provide guidance when evaluating giving options by mapping the charitable ecosystem.

Six modules cover:

- The Charitable Sector Landscape
- How Charities Operate
- Planning for Impact
- Emerging Philanthropic Trends
- Funding of Canadian Charities
- Legal and Ethical Considerations

Integrating Gift Planning

Obtain a deep, broad knowledge of how to apply gift planning vehicles to the objectives of various client profiles. Learn how to stay onside with ethical and legal considerations in doing so. Using true-to-life case studies, the student will learn to anticipate how to help clients maximize their gifts and make impactful gifts while minimizing the costs of giving.

Six Modules cover:

- Multi-Stakeholder Planning
- Working with Vulnerable Clients
- Guaranteed 10 Pay Insurance Gift
- Legacy Planning for Business Owners
- Donation of Existing Life Insurance Policy
- Using FTS to Lower the After-Tax Cost of Charitable Donations
- Using Insurance to Make a Major Gift
- Using the CPP for Philanthropy



Who is the MFA-P™ Program Designed For?

The MFA-P™ Philanthropy Designation program is designed for advisors looking to incorporate charitable giving into their client conversations. This includes financial advisors, investment advisors, life insurance advisors, lawyers and accountants. It is also an important differentiator for advisors seeking prospective high-net worth clients. The MFA-P™ is also a valuable credential for those working in the charitable and non-profit sector.

Why should I enrol in the MFA-P™ program?

The MFA-P™ is designed to help advisors incorporate strategic charitable giving into their client conversations. There are many reasons to discuss philanthropy with your clients:

- Charitable giving is an important part of holistic financial planning, including estate planning.
- It is an opportunity to get to know your clients on a deeper level by understanding their values and an easy way to reach out to your clients' extended families including their children and grandchildren.
- You can help to structure charitable gifts in a simple but effective way and help your clients realize their philanthropic goals while maintaining the integrity of their investment, estate, and tax planning strategies.
- Advisors who connect family values and history as part of a long-term wealth management approach will be well-equipped to address increasing concerns clients have to make a difference in today's world of heightened social awareness.
- All professional advisors interviewed in a 2014 Canadian survey entitled The Philanthropic Conversation agreed that having incorporated philanthropy into their practice has strengthened and solidified their business. It is not only the right thing to do; it is unequivocally good for your clients and your practice.

I work at a charity. Is the MFA-P™ program for me?

The program will benefit those who work in the charitable and non-profit sector, as well as consultants and other individuals who support the sector. While designed for advisors, the MFA-P™ program will provide an understanding of charitable giving using a multi-stakeholder approach. The MFA-P™ designation will add credibility to those who cultivate relationships with both their clients and the professional advisors they work with.

Why choose the MFA-P™, in a nutshell?

- Provide unique and valuable service to your existing clients.
- Prospecting for new high net worth and charitable-minded clients.
- A powerful tool to transition your service to the next generation of your clients' family

What are the Re-Certification Requirements?

Your license to use the MFA-P™ marks must be annually renewed to meet Standards of Conduct and continuing education requirements (15 credit hours each year). A \$395 recertification fee also applies by the June 30 annual recertification deadline.

About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.



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- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee.
- Continuing education credits from most professional bodies and regulators.

“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!

