

# Professional Qualification Trust Training Certificate (TTC)



## A Promising Future

With the rise of private wealth in Asia Pacific and the rapid economic development in the Greater Bay Area, the outlook for Hong Kong's trust and fiduciary services industry is promising. In tandem, the demand for comprehensive services such as estate and succession planning, family office services and fund services is increasing – providing significant opportunities for industry participants and solidifying Hong Kong's role as an international asset and wealth management centre.

The trust industry will continue to benefit from market changes, such as incentives for family offices and funds, the implementation of eMPF platform and other digital initiatives, the Securities and Futures Commission (SFC)'s proposed new licensing regime for depositaries of collective investment schemes (Type 13 regulated activity), as well as the Hong Kong Monetary Authority (HKMA)'s proposed Code of Practice for Trust Business.



## Your Professional Roadmap

The move to raise the bar for the trust industry expertise is crucial in capitalising on the growth opportunities and the **Trust Training Certificate (TTC)** is the ideal professional qualification to advance and broaden practitioners' competencies.

Comprised of a two-part training course (Part A and Part B), and examinations, the TTC is a core component in achieving the Hong Kong Trustees' Association (HKTA)'s **Certified Trust Practitioner™ (CTP)** designation\*.

## TTC is a self-paced certification programme designed for

**Individuals** who plan to develop their skills and achieve professional standards within the trust and fiduciary services industry

**Practitioners** who would like to advance their knowledge and enhance their core competencies

**Professionals** from wealth and asset management, private wealth management, trust custodian, family office, banking, law and compliance sectors etc

## Scope of Contents



Trust and fiduciary services



Estate planning



Succession planning



Compliance



Tax



Family office



Comparison of HK with other trust jurisdictions



Private trusts



Collective investment schemes and retirement schemes (MPF/ORSO)

## Recognition and Professional Training Hours

Participants can attain professional training hours recognised by HKTA, SFC and PWMA.

(March 2022)

## TTC Training Programme and Examination# @ a glance

| Training Programme  | Schedule   | Corresponding Examination Paper   Full Package## and Examination Fee | Professional Training Hours           |
|---|--|--|---------------------------------------|
| <b>Part A (Webinar)</b><br>Units 1 – 7  | 8 <sup>th</sup> cohort: February – April 2022<br>Examination: 14 May 2022<br>(Enrolment deadline for package purchase: 16 February 2022) | Part A   HKD15,000   | HKTA: 21.0<br>SFC: 21.0<br>PWMA: 21.0 |
| <b>Part B Stream 1 (Webinar): Private Trusts</b><br>Unit 8 – 11, Units 13 – 14 and Unit 17                          | 5 <sup>th</sup> cohort: May – July 2022<br>Examination: 23 July 2022<br>(Enrolment deadline for package purchase: 12 May 2022)           | Part B – Stream 1   HKD18,000  |                                       |
| <b>Part B Stream 2 (eCourse): Collective Investment Schemes and Retirement Schemes</b><br>Unit 11 and Units 17 – 22 | 5 <sup>th</sup> cohort: May – July 2022<br>Examination: 23 July 2022<br>(Enrolment deadline for package purchase: 28 June 2022)          | Part B – Stream 2   HKD16,000  |                                       |

# Individuals are required to complete all 7 syllabus units of above corresponding TTC Programme within 3 years – counting from the 1st syllabus unit attended to the examination date, before sitting for the TTC Examination.

## HKSI Institute accepts AlipayHK and WeChat Pay when individuals make payment online or over its service counter. Click [here \(https://www.hksi.org/en/payment-methods/\)](https://www.hksi.org/en/payment-methods/) for a glance of all payment methods.

## Special Offers

Corporate group enrolments can enjoy discounts if undertaking syllabus units of Part A or Part B (Stream 1) or Part B (Stream 2).

| 3-5 staff | >5 staff |
|-----------|----------|
| 5% off    | 10% off  |



## WAM Pilot Programme

### Get Your Reimbursement Now!

TTC Part A and Part B Stream 1 are delivered in webinars which are eligible for reimbursement under the [Financial Incentive Scheme \(https://www.wamtalent.org.hk/eng/financial\\_incentives\\_scheme\\_for\\_professional\\_training/guide\\_to\\_applicants.html\)](https://www.wamtalent.org.hk/eng/financial_incentives_scheme_for_professional_training/guide_to_applicants.html) of the WAM Pilot Programme. Please refer to the [WAM Pilot Programme website \(www.wamtalent.org.hk/eng/\)](http://www.wamtalent.org.hk/eng/) for details.

## Plan Today For Your Professional Career Tomorrow

Contact us to find out more

**TTC**

T: 3120 6100 | [education@hksi.org](mailto:education@hksi.org)  
[www.hksi.org/qualification](http://www.hksi.org/qualification)

**CTP**

T: 3511 6036 | [accreditation@hktrustees.com](mailto:accreditation@hktrustees.com)  
[www.hktrustees.com/accreditation](http://www.hktrustees.com/accreditation)

| Training Programme  | Examination   | Accreditation Programme   |
|---|---|---|
|  |  |  |