



## HKTA Certified Trust Practitioner™

### Experienced Practitioner Exemption – Application Form

Personal Details							
Full Name (English)							
Full Name (Chinese)							
Correspondence Address							
HKID Card No. /Passport Number				Home/Mobile telephone number			
Email Address:							
Employment Details							
Current Employer Name							
Current Employer Address							
Telephone number							
Type of business undertaken by employer (please tick any which are applicable)							
Private Trusts	Unit Trusts/Fund services	ORSO retirement schemes	MPF retirement schemes	Estate planning	Legal services	Company secretarial services acting as trustee	Banking services
Custody	Commercial trusts/escrow	Family office	Other (please describe)				
<b>Length of employment with this employer</b> (in years and months) If your employment period is less than 10 years with the above employer, please fill out Appendix A covering previous employment							

<b>Your job title(s) and position(s) held so far:</b> (please list in chronological order)							
<b>Describe the day to day activities of your job:</b>							
<b>In which of the following areas have you acquired hands-on experience at your current job</b> (please tick all appropriate boxes)							
Private Trusts	Unit Trusts/Fund services	ORSO retirement schemes	MPF retirement schemes	Estate planning	Legal services	Company secretarial services acting as trustee	Banking services
Custody	Commercial trusts/escrow	Family office	Other (please describe)				

<b>Academic Record</b>		
<b>Degree Awarded</b>	<b>Date awarded</b>	<b>University /Institution</b>

<b>Industry /regulatory awards designation</b> (eg HK SFC, law society member, CPA, overseas body etc)		
<b>Designation Awarded</b>	<b>Date awarded</b>	<b>Regulator/Institution/Trade body</b>

References			
<b>Employer supervisor: Referrer 1 (to be completed by the Director/CEO/Supervisor of Applicant's Employer)</b>			
<b>Referrer Name</b>			
<b>Referrer's Employer</b>			
<b>Email address</b>		<b>Telephone number</b>	
<p><b>Referrer's comments on applicant.</b> Please state length of time you have been associated with the Applicant, in what capacity you are associated, If you consider the applicant's experience is relevant and appropriate on trusts, please describe the job activities of the Applicant and duration in the position(s).</p>			
<b>Referrer Signature</b>			<b>Date</b>

HKTA member: Referrer 2 (to be completed by Referrer 2)			
<b>Name of Referrer</b>			
<b>Referrer's Employer</b>			
<b>Email address</b>		<b>Telephone number</b>	
<p><b>Referrer's comments on applicant.</b> Please state length of association with the applicant and in what capacity you are associated. If you consider the applicant's experience is relevant and appropriate on trusts, likely to advance the HKTA by their membership, likely or not to contribute to the HKTA through committee work, teaching, or other means.</p>			
<b>Referrer Signature</b>			<b>Date</b>

HKTA member: Referrer 3 (to be completed by Referrer 3)			
<b>Name of Referrer</b>			
<b>Referrer's Employer</b>			
<b>Email address</b>		<b>Telephone number</b>	
<p><b>Referrer's comments on applicant.</b> Please state length of association with the applicant and in what capacity you are associated. If you consider the applicant's experience is relevant and appropriate on trusts, likely to advance the HKTA by their membership, likely or not to contribute to the HKTA through committee work, teaching, or other means.</p>			
<b>Referrer Signature</b>			<b>Date</b>

## Personal Information Collection and Data Privacy Statement

The Hong Kong Trustees' Association undertakes to keep your personal information confidential, stored in a secure environment, and shall not use your personal data for any purpose other than that intended by this application, without your express permission.

### Applicant Acknowledgement and Declaration

- 1) I hereby declare that the information contained in this Application Form is true and correct in all respects.
- 2) In regard to Personal Information Collection and Data Privacy, in checking each box I hereby:
  - Authorise The Hong Kong Trustees' Association to share all information in connection with my application with the HKTA Accreditation Committee members, the HKTA Executive Committee, the Hong Kong Securities and Investment Institute and such other committees and/or designated persons as may be formed or required from time to time whose purpose is to access my eligibility for EPE from the TTC course, my CTP designation and my ongoing requirements thereto.
  - Authorise The Hong Kong Trustees' Association and their delegated committee members to contact my referees listed above, my previous employers, educational institutions, industry associations or regulatory authorities in order to verify the information provided in this application.
  - Undertake to update The Hong Kong Trustees' Association if there are any changes to my personal data or circumstances which may have a material impact on my CTP designation
  - Agree that The Hong Kong Trustees' Association may contact me about seminars and courses they hold or which other associations may hold and which The Hong Kong Trustee' Association believe may be of interest to me.
- 3) I confirm that I have read and understood the requirements and information in this form including the Personal Information Collection and Data Privacy Statement above and consent to the terms and conditions above.

**Applicant signature**

**Date**

Please send the applications with payment and attachments to:

**Hong Kong Trustees' Association**  
**Room 739, 7/F, Grand Millennium Plaza, 181 Queen's Road Central, Hong Kong**

If you have any queries about this form or the application in general please contact us at [accreditation@hktrustees.com](mailto:accreditation@hktrustees.com) and quote "EPE Accreditation" as the caption.

### Checklist for EPE application

	Items	
1	Application fee HK\$5,000 (cheque to be made payable to "HK Trustees' Association")	
2	A copy of your HKID card / Passport	
3	<p>Your detailed CV should include the following information :</p> <ul style="list-style-type: none"><li>a. full details of your academic and/or industry qualifications. Please include certified true copies of your academic/industry certificates demonstrating the designation has been awarded. The qualified certifiers include lawyers, accountants, company secretaries, bankers, and TCSP directors registered in Hong Kong.</li><li>b. full details of your current and previous job titles and the specific tasks you have performed in those roles and state whether you have undertaken that task or have managed/supervised that task.</li><li>c. State which industry associations you are a member of/director of and what contribution you have made to that association (committee work, seminars, lectures, exam setting etc.)</li></ul>	
4	CV attachments (i.e. employment references)	

## Appendix A

### Previous Employment Information Sheet

Please complete this form if your relevant hands-on experience period under Requirement 2 in Section 3 has been completed with different employers.

Previous Employment Details							
Employer Name							
Employer Address							
Telephone number							
Name and contact details of your supervisor							
Type of business undertaken (please tick whichever is applicable)							
Private Trusts	Unit Trusts/Fund services	ORSO retirement schemes	MPF retirement schemes	Estate Planning	Legal services	Company secretarial services acting as trustee	Banking services
Custody	Commercial trusts/escrow	Family office	Other (please describe)				
Period of employment with this employer (from and to)							
Your job title(s) and position(s) held (please list in chronological order)							
Describe the day to day activities of your job							
In which of the following areas have you had hands on experience with this employer (please tick all appropriate boxes)							
Private Trusts	Unit Trusts/Fund services	ORSO retirement schemes	MPF retirement schemes	Estate planning	Legal services	Company secretarial services acting as trustee	Banking services
Custody	Commercial trusts/escrow	Family office	Other (please describe)				

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Custody	Commercial trusts/escrow	Family office	Other (please describe)				
Period of employment with this employer (from and to)							
Your job title							
Describe the day to day activities of your job							
In which of the following areas have you had hands on experience with this employer (please tick all appropriate boxes)							
Private Trusts	Unit Trusts/Fund services	ORSO retirement schemes	MPF retirement schemes	Estate planning	Legal services	Corporate /company secretarial services	Banking services
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