

Hong Kong Trustees' Association
Continuous Professional Development (CPD) Policy for
Certified Trust Practitioners (CTP)

1. HKTA individual members who are Certified Trust Practitioners (CTPs) are required, during a calendar year, to obtain a total of 6 CPD points on trust related topics for the purpose of annual renewal of CTP certificate.
2. Each CPD year start from 1 January to 31 December.
3. All newly approved CTPs are required to fulfil their CPD hours in the following calendar year. For example - CTPs who are approved in 2025, they are required to complete the 6 CPD points by the end of 2026.
4. No CPD points can be carried forward to the next calendar year.
5. No CPD point will be granted if the attendee is late or early departure for 15 minutes for the seminar/webinar

Relevant activities for CPD points

6. Attending or presenting at seminars and conferences on trust related topics.
Examples of activities (with proposed CPD points) include:

| | <i>Activities</i> | <i>Proposed CPD points</i> |
|----------|--|--------------------------------------|
| 1 | Attending HKTA seminars and conferences | One CPD point per hour |
| 2 | Speaking (including preparation) for HKTA seminars and conferences | Two CPD point per hour |
| 3 | Trust Training Certificates course | |
| a. | Attending courses | One CPD point per hour |
| b. | Teaching courses | One CPD point per hour |
| c. | Preparing course material | Six CPD points for a 3-hour course |
| d. | Reviewing course material | Three CPD points for a 3-hour course |

7. The Professional Development and Training Sub- Committee will consider granting CPD points for seminars organised by other organisations on a case-by-case basis.
8. The seminars organized by the following organizations, along with the events supported by HKTA, will be accredited for HKTA CPD points.
 - STEP
 - The Hong Kong Chartered Governance Institute (HKCGI)

Record keeping and annual declaration

9. All CTPs are obligated to keep records (e.g. attendance certificates or other documentary evidences) about completion of the seminars/ conference. These records may be required to be produced for the purpose of verification of CPD hours acquired.
10. All CTPs are required to submit declaration form to the HKTA Secretariat by end of January each year to confirm the CPD points they acquired from previous calendar year for the purpose of CTP certificate renewal. A non-refundable CTP renewal payment should also be enclosed with the declaration form.
11. CTPs should retain their CPD record for a period of three (3) years.

Non compliance

12. CTPs who cannot fulfil the 6 CPD points by end of December of each calendar year, will be given a grace period of three (3) months to fulfil the outstanding CPD points by end of March of the following year.
13. For CTPs who fail to fulfil the outstanding CPD points by end of the grace period (i.e. end of March of the following year); or who provide misleading, incorrect or false information, such incidents will be reported to the Executive Committee. Their CTP certificates may be cancelled.