

# CERTIFIED TRUST PRACTITIONER™ APPLICATION FORM

## A. PERSONAL PARTICULARS

Name(s) should be the same as your identification document.

English Name: (Mr/Mrs/Ms) \_\_\_\_\_ (Surname) \_\_\_\_\_ (First name)

Chinese Name: \_\_\_\_\_ (if any) HKID / Passport No.: \_\_\_\_\_

Contact No.: \_\_\_\_\_ Email Address: \_\_\_\_\_

Residential address: \_\_\_\_\_

Preferred correspondence address:  Residential Address  Office Address

## B. EMPLOYMENT DETAILS (PLEASE TICK AS APPROPRIATE)

Company Name: \_\_\_\_\_ Office. No.: \_\_\_\_\_

Job Title: \_\_\_\_\_ Date of Commencement: \_\_\_\_\_

Office Address: \_\_\_\_\_

Types of business of current employer:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Private Trusts                                 | <input type="checkbox"/> Unit Trusts/Fund services | <input type="checkbox"/> ORSO retirement schemes |
| <input type="checkbox"/> Banking services                               | <input type="checkbox"/> MPF retirement schemes    | <input type="checkbox"/> Estate planning         |
| <input type="checkbox"/> Legal services                                 | <input type="checkbox"/> Custody                   | <input type="checkbox"/> Family office           |
| <input type="checkbox"/> Company secretarial services acting as trustee | <input type="checkbox"/> Commercial trusts/escrow  |  |
| <input type="checkbox"/> Other (please specify: _____)                  |  |  |

## C. EDUCATION INFORMATION

Name of Institution	Qualification Obtained	Country	Year of Award	Certificate attached (√)

## D. PROFESSIONAL QUALIFICATION

Name of Professional Body	Qualification Obtained	Way of obtaining	Country	Year of Award	Certificate attached (√)

**E. FULL EMPLOYMENT RECORD (IN CHRONOLOGICAL ORDER) (PLEASE TICK AS APPROPRIATE)**

Please provide the information on separate sheets if there is insufficient space.

Company Name	Job Title	Employment Period (dd/mm/yyyy)	Acquired hands-on relevant experience
			<input type="checkbox"/> Private Trusts <input type="checkbox"/> Unit Trusts/Fund services <input type="checkbox"/> ORSO retirement schemes <input type="checkbox"/> Banking services <input type="checkbox"/> MPF retirement schemes <input type="checkbox"/> Estate planning <input type="checkbox"/> Legal services <input type="checkbox"/> Custody <input type="checkbox"/> Family office <input type="checkbox"/> Company secretarial services acting as trustee <input type="checkbox"/> Commercial trusts/escrow <input type="checkbox"/> Others, please specify: _____
			<input type="checkbox"/> Private Trusts <input type="checkbox"/> Unit Trusts/Fund services <input type="checkbox"/> ORSO retirement schemes <input type="checkbox"/> Banking services <input type="checkbox"/> MPF retirement schemes <input type="checkbox"/> Estate planning <input type="checkbox"/> Legal services <input type="checkbox"/> Custody <input type="checkbox"/> Family office <input type="checkbox"/> Company secretarial services acting as trustee <input type="checkbox"/> Commercial trusts/escrow <input type="checkbox"/> Others, please specify: _____
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## G. PAYMENT (PLEASE TICK AS APPROPRIATE)

### CTP application fee for TTC Graduates \$1,000

#### PAYMENT METHOD:

- Cheque payment (Cheque no. \_\_\_\_\_ Bank code: \_\_\_\_\_)  
(made payable to "HK TRUSTEES' ASSOCIATION LTD") and sent to **HKTA, Room 739, 7/F, Grand Millennium Plaza, 181 Queen's Road Central, HK. (Post-dated cheques will NOT be accepted.)**
- Bank Transfer (  local bank transfer       overseas bank transfer)  
to **Standard Chartered Bank** A/C No.: **447-0-024582-3**. Please email the bank receipt (indicate "CTP application fee" and applicant's full name on it) to [queries@hktrustees.com](mailto:queries@hktrustees.com) (Note: Applicant should bear the bank charges involved in overseas bank transfer. Otherwise, the Association will reserve the right to request the applicant to pay back the bank charges)

#### NOTES FOR CTP APPLICATION

1. Upon approval, you will receive email confirmation and your name will be shown on the HKTA CTP list on the website.
2. Application fee paid is non-refundable and non-transferable.
3. CTP is subject to renewal on an annual basis (based on calendar year).
4. For CTPs who cannot fulfil the 6 CPD points by end of December of each calendar year; or 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.
5. Personal Information Collection and Data Privacy Statement: The HKTA undertakes to keep your personal information confidential, stored in a secured environment, and shall not use your personal data for any purpose other than that intended by this application, without your express permission.

## H. DECLARATION AND ACKNOWLEDGEMENT

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:
  - (a) 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, or my ongoing requirements thereto;
  - (b) authorise The Hong Kong Trustees' Association and their delegated committee members to contact my referee(s) listed above, my previous employer(s), educational institute(s), industry association(s) or regulatory authority(ies) in order to verify the information provided in this application;
  - (c) 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; and
  - (d) 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.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

## I. CHECKLIST (PLEASE TICK AS APPROPRIATE)

Before submitting the form, please ensure that the following are included in the application:

- Completed CTP Application Form with signature of referee
- A cheque payable to the "HK Trustees' Association Ltd" or bank transfer slip
- Copy of HKID card or Passport
- Copies of educational and professional certificates
- Copy of Trust Training Certificate