

HKTA CONFERENCE 2019

HKTA Accreditation Program Certified Trust Practitioner™

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Certified Trust Practitioner™

WHY ?

Improve industry standards

Confidence of clients

Assist in broader industry
understanding of trusts

HKTA standards and CPD

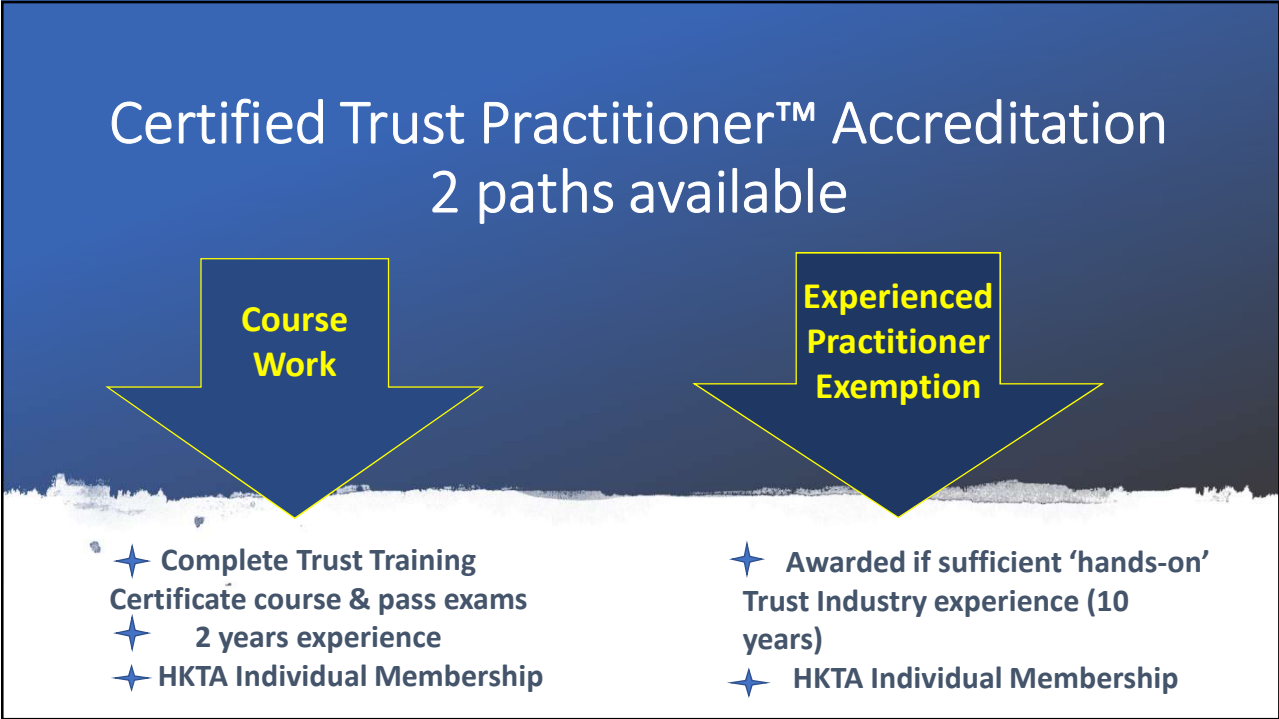
Train new employees in the trust industry

A standard for employers in recruiting

Possible future standards for TCSP & RA 13 licenses

Need for a practical HK focussed course

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TTC - Inaugurated Aug 2018

Design Features

Part A

7 units
No electives (yet)
21 hours in class
Examination
All units stand alone option

CPD accreditation with
HKTA, SFC, PWMA,
Law Society
Eligible for WAM subsidy

Part B

7 Units
2 Streams
Electives available
21 hours in class
Examination
All units stand alone option

CPD accreditation with
HKTA, SFC, PWMA,
Law Society 3 units
MPFA 2 units
Eligible for WAM subsidy

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Statistics TTC

6000+ hours spent

4050+ HKTA **2000+** HKSI

Design prep, course materials, exam setting, CPD applications

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Statistics TTC

99 hours teaching time

17 lecturers

7



Statistics TTC

260 participants
attended one or more
units of TTC

8

Statistics TTC

68 participants finished or currently undertaking Part A full course

32 completed Part A & B full course

9

Statistics TTC

24 graduates

16 awarded CTP

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Experienced Practitioner
Exemption (EPE)

23 granted
Experienced
Practitioner Exemption

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Certified Trust
Practitioners (CTP's)

39 CTP designations
granted

CPD applies: 6 hours trust related

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What Next ?

Part A

Elective units
2 streams (Private and Corporate trusts)
Provision of material for RA13 Trustee

Part B

More Electives
Accreditation all units law society

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What Next ?

General

Broader CPD recognition
Unit exemptions from other courses
Abridged courses
On line course delivery
Interactive on-line sessions
Specialised courses eg PRC market

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More Information:

<http://www.hktrustees.com/accreditation>

Questions?