



香港信託人公會
Hong Kong Trustees' Association

HKTA CONFERENCE 2021

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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Certified Trust Practitioner™ Accreditation

2 paths available

**Course
Work**

**Experienced
Practitioner
Exemption**

- ★ Complete Trust Training Certificate course & pass exams
- ★ 2 years experience
- ★ HKTA Individual Membership

- ★ Awarded if sufficient 'hands-on' Trust Industry experience (10 years)
- ★ HKTA Individual Membership



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Trust Training Course (TTC)

HKTA Partners with HKSI

Part A

Private trusts and trust concepts, estate planning vehicles, fiduciary duty, compliance

Part B

Stream 1

PT: Private trusts and succession vehicles, compliance, tax

Stream 2

CIS: Commercial and corporate trusts, compliance, tax



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TTC - Commenced Aug 2018

Design Features

Part A

7 units

No electives (yet)

21 hours in class*

Examination

All units stand alone option

*All Online as from 2021

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

Part B

7 Units

2 Streams

Electives available

21 hours in class*

Examination

All units stand alone option

*All Online as from 2021

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



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Statistics TTC

7500+ hours spent

Design prep
course materials
exam setting
CPD applications
Webinars
lecturing
exam marking
revision classes



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Statistics TTC

18 lecturers



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Statistics TTC

872 participants
attended one or more
units of TTC



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Statistics TTC

253 participants finished or currently undertaking Part A full course

89 completed Part A & B full course



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Statistics TTC

328 undertook examinations

Part A

232

Part B

96



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Statistics TTC

58 graduates

37 awarded CTP



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Experienced Practitioner Exemption

29 granted CTP
through EPE



Certified Trust
Practitioners (CTP's)

Total **66** CTP
designations granted

CPD applies: 6 hours trust related

Keeping the course relevant

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Part A

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

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Part B

More Electives
ESG and Digital Currencies
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
Workshops



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

Questions?