

HKTA CONFERENCE 2021

HKTA Accreditation Program Certified Trust Practitioner[™]

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Certified Trust Practitioner[™]



Improve industry standards

Assist in broader industry understanding of trusts

Confidence of clients

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



Certified Trust Practitioner™ Accreditation 2 paths available Course Work

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

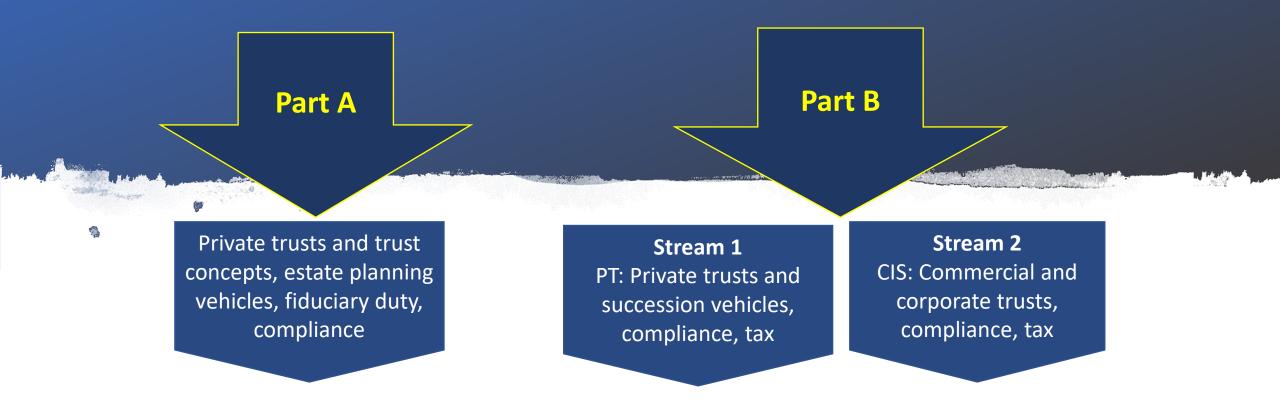
 Awarded if sufficient 'hands-on' Trust Industry experience (10 years)
HKTA Individual Membership

Exemption



Trust Training Course (TTC)

HKTA Partners with HKS





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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



7500+ hours spent

Design prep

course materials

Webinars

exam setting

CPD applications

lecturing

exam marking

revision classes



18 lecturers



872 participants attended one or more units of TTC



253 participants finished or currently undertaking Part A full course

89 completed Part A & B full course



328 undertook examinations

Part A

Part B



58 graduates

37 awarded CTP



Experienced Practitioner Exemption

29 granted CTP through EPE

Certified Trust Practitioners (CTP's)

Total 66 CTP designations granted

CPD applies: 6 hours trust related



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Keeping the course relevant

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

Part A

More Electives ESG and Digital Currencies Accreditation all units law society

Part B



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?