CFTEA
Center for Financial Training & Education Alliance

Trust: Advanced Certificate

7.2019

NAME:____ Month/Day of Birth: _____/_____

Organization:____

Email address:________________________________ Tel#________________________

ABA TRAINING

For the experienced professional, our online program gives an in-depth understanding of the fiduciary role. Learn to propose sophisticated solutions to complex client situations on topics like estate planning, trust administration, investment management, and ethics. For those wishing to earn the CTFA professional designation, the ABA Certificate in Trust: Advanced satisfies the third of three levels of study required to sit for the exam.

REQUIRED COURSES:

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Asset Allocation and Portfolio Management			●		
		Economics & Markets			●		
		Education Planning Solutions for Minors			●		
		Estate Planning for Charitable Giving			●		
		Estate Planning for IRAs and Qualified Plan Balances			●		
		Estate Planning for the Marital Deduction			●		
		Estate Planning Solutions for the Business Owner			●		
		Fundamentals of Alternative Investment Products			●		
		Generation-Skipping Transfer Tax			●		
		Gift Taxation			●		
		Income Tax Planning			●		
		Managing Life Insurance Policies			●		
		Planning for Estate Tax			●		
		Prudent Portfolio Management			●		
		Special Needs Trusts			●		

L= Live W=CFTEA Webcourse SP= Self-paced Online ILO = Instructor-Led Online GL = Guided Learning

PLEASE CONTACT THE CFTEA OFFICE FOR CONFIRMATION OF COMPLETION WHEN APPROACHING COMPLETION OF A CERTIFICATE OR DIPLOMA