

NAME: \_\_\_\_\_ Month/Day of Birth: \_\_\_\_/\_\_\_\_

Organization: \_\_\_\_\_

Email address: \_\_\_\_\_ Tel# \_\_\_\_\_



Individuals can earn this certificate - designed for those who need to establish or strengthen their understanding of basic wealth management and trust principles. This program provides an introduction to estate planning, trust administration, investment management concepts and ethical behavior.

For those wishing to earn the CTFP professional designation, the ABA Certificate in Trust: Foundational satisfies the first of three levels of study required to sit for the exam.

**REQUIRED COURSES:**

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		A Guide to Ethics in Fiduciary and Trust Activities			•		
		A Guide to Ethics in Investments			•		
		Estate and Guardian Administration			•		
		Introduction to Estate Planning			•		
		Introduction to Investment Management			•		
		Introduction to IRAs			•		
		Introduction to Planning for Retirement Assets			•		
		Introduction to Trust Administration			•		
		Minimizing Fiduciary Risk and Litigation			•		

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