

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

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

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



Ideal for individuals with some field experience who have mastered the concepts introduced in the foundational trust certificate, either online or in-person. The certificate provides a more sophisticated understanding and further knowledge of the tools available to a fiduciary, covering estate planning, trust administration, investment management concepts and ethical behavior.

For those wishing to earn the CTFP professional designation, the ABA Certificate in Trust: Intermediate satisfies the second 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 Financial Planning			●		
		A Guide to Ethics in Tax Law & Tax Planning			●		
		Account Acceptance and Termination			●		
		Basic Characteristics of a Trust			●		
		Bond Selection and Analysis			●		
		Discretionary Distributions			●		
		Duties and Powers of the Trustee			●		
		Estate Planning to Achieve Client Goals			●		
		Fiduciary Income Tax			●		
		Fiduciary Law			●		
		Fundamentals of Life Insurance			●		
		How Trusts are Taxed			●		
		Investment Policy			●		
		Investment Products			●		
		Stock Selection and Analysis			●		
		Types of Insurance			●		
		Understanding Transfer Tax			●		

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