



Version 2.0

Professional Qualification Trust Training Certificate (TTC)

The Budget Speech 2024 brings exciting news: the extension of the Grant Scheme for Open-ended Fund Companies (OFC) and the Real Estate Investment Trusts (REITs). This development positions Hong Kong as a magnet for global investors and family offices, and is expected to drive a surge in demand for expert financial services, propelling the industry forward.

The **New Capital Investment Entrant Scheme (new CIES)** is set to attract affluent investors, invigorating our markets with fresh capital in tech sector and startups. OFC's inclusion under this scheme signals a broader horizon for investment choices.

In this landscape, the **Trust Training Certificate (TTC)** emerges as the essential credential for trust professionals seeking to capitalise on Hong Kong's flourishing financial services industry. Elevate your career with TTC - where expertise meets opportunity.

TTC (version 2.0) is a self-paced certification programme designed for

Individuals who plan to develop their skills and achieve professional standards within the trust and fiduciary services industry

Practitioners who would like to advance their knowledge and enhance their core competencies

Professionals from wealth and asset management, private wealth management, trust custodian, family office, banking, law and compliance sectors etc

Designed to advance and broaden practitioners' competencies, TTC is an ideal professional qualification demonstrating your knowledge and skills in an evolving and competitive industry.

Comprising of a two-part (Part A and Part B) training and examinations, the TTC is a core component in achieving the Certified Trust Practitioner™ (CTP) or Certified Trust Affiliate (CTAff) designation* of the Hong Kong Trustees' Association (HKTA).

Highlights of TTC version 2.0

Broad-based syllabus:

Part A has been expanded to encompass corporate trusts and relevant regulatory regimes, while Part B has been updated to reflect new legislation, focusing more specifically on Hong Kong arrangements.

Learning mode:

Training courses are run in webinar format, enabling participants to engage with the trainer from any location.

Updated regulatory regime content:

Stay informed about the latest HKMA Code of Practice for Trust Business and the new SFC Regulated Activity type 13 (RA13) requirements.

Examination format:

The format has transitioned from paper-based to computer-based.

Recognition and Professional Training Hours

Participants can attain professional training hours recognised by SFC, HKTA and PWMA.
(CPD accreditation of The Law Society of Hong Kong is being applied for)

(March 2024)

TTC (version 2.0) Training and Examination# @ a glance

Training (Webinar)	Schedule	Corresponding Examination Paper Full Package## and Examination Fee	Professional Training Hours###
Part A Fundamental principles and practices of trusts Units 1-7	April 2024 Cohort Examination: 15 June 2024 (Enrolment deadline for package purchase: 8 April 2024)	Part A HKD15,000	SFC: 21 hours HKTA: 21 hours PWMA: 21 hours
Part B Stream 1: Private Trusts Units 8-11, Unit 13, Unit 17 and Unit 19	Part B is scheduled to commence in the 2nd half of 2024, with details to be announced.		SFC: 21 hours HKTA: 21 hours PWMA: 21 hours
Part B Stream 2: Collective Investment Schemes / Retirement Schemes Unit 11 and Units 17 – 22			SFC: 21 hours HKTA: 21 hours PWMA: 21 hours

Individuals are required to complete all 7 syllabus units of above corresponding TTC Programme within 3 years – counting from the 1st syllabus unit attended to the examination date, before sitting for the examination and the Part A and Part B of TTC Examination within 6 years from the date of the first class of the course.

HKSI Institute accepts AlipayHK and WeChat Pay when individuals make payment online or over its service counter. Click [here](#) for all payment methods.

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Corporate group enrolments can further enjoy discounts off the training package price when undertaking **all seven (7) units of Part A:**

Further Special Offers for Corporates

3-5 Staff

5% off

>5 staff

10% off

Plan Today For Your Professional Career Tomorrow

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Training



Examination



Announcement



Accreditation



TTC

T: 3120 6100 | education@hksi.org | www.hksi.org/qualification

CTP

T: 3511 6036 | accreditation@hktrustees.com | www.hktrustees.com/accreditation