

# TRUST TRAINING CERTIFICATE (TTC)

## VERSION 2.0

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

### Who is this certification programme for?

#### Individuals

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

#### Practitioners

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

#### Professionals

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

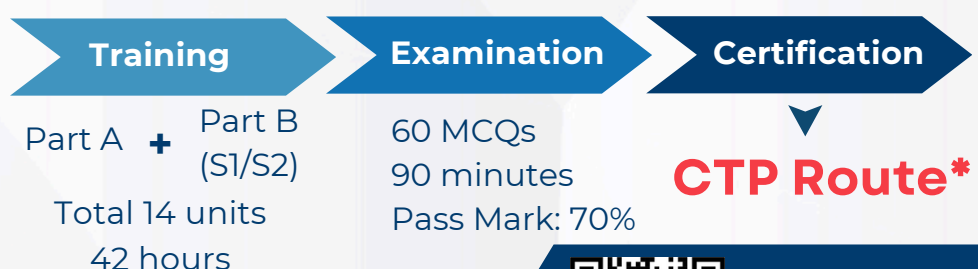
Achieving HKTA's

**CERTIFIED TRUST PRACTITIONER™  
(CTP) DESIGNATION\***

### Learning Outcomes

- Acquire a good understanding of the trust and fiduciary industries
- Understand the different types of trusts, their applications, benefits and management
- Gain knowledge of the fundamental principles and practices of trusts
- Advance your understanding of trusts, trust structures for both private and commercial applications

### Programme Structure



**ENROL  
NOW**

\*Remark: CTP or CTAff designation will be awarded to individual members of the HKTA who have satisfied the certification, experience and membership requirements.

## Part A

7 units (21 hours) English

- Unit 1 – Introduction to Trusts
- Unit 2 – Types of Trusts and when appropriate
- Unit 3 – Other Estate Planning Vehicles
- Unit 4 – Trusts Compared with Other Estate Structuring Vehicles
- Unit 5 – Trustees and Compliance
- Unit 6 – Trusts and Compliance
- Unit 7 – Trust Jurisdiction Comparison



**eCourse**  
format



**Virtual 100%**  
access anytime and  
anywhere



**CPD Accreditation**

- HKTA: 21.0/part
- SFC: 21.0/part
- PWMA: 21.0/part
- Law Society: 21.0/part

## Part B Stream 1: Private Trusts

7 units (21 hours) English

- Unit 8 – Other Trusts in Detail
- Unit 9 – The Contents of Trusts and Drafting
- Unit 10 – Testamentary Issues & Avoiding Testamentary Disputes
- Unit 11 – International Taxation
- Unit 13 – Family Offices
- Unit 17 – Trusts and Issues for PRC Nationals
- Unit 19 – Collective Investment Schemes – Part 1 Private Arrangements



**Financial subsidy**  
WAM Pilot Programme



**Study pack**

- study guide with executive summary, review questions and legislative examples
- sample exam questions
- overhead slides
- free revision class

## Part B Stream 2: Collective Investment Schemes ("CIS")/ Retirement Schemes

7 units (21 hours) English

- Unit 11 – International Taxation
- Unit 17 – Trusts and Issues for PRC Nationals
- Unit 18 – Trusts for Security arrangements, commercial and employee benefit needs
- Unit 19 – Collective Investment Schemes – Part 1 Private Arrangements
- Unit 20 – Collective Investment Schemes – Part 2 Public Offering Arrangements
- Unit 21 – Hong Kong Mandatory Retirement Scheme Trusts - MPF
- Unit 22 – Hong Kong Retirement Scheme Trusts - ORSO



**Student support**  
Email HKTA for any questions on the content

**Further Special Offers for Corporate group enrolment**

3-5 staff **5% off**  
>5 staff **10% off**



## 2025 Schedule

1st cohort	Enrolment Start date	Enrolment Deadline	Study period	Examination* (Time: 5:30pm)	Package Fee (Training + Exam)
<b>Part A</b>	4 March 2025	19 May 2025	4 Mar - 2 Jun 2025	2 June 2025	\$15,000
<b>Part B (S1)</b>	5 March 2025	20 May 2025	5 Mar - 3 Jun 2025	3 June 2025	\$18,000
<b>Part B (S2)</b>	6 March 2025	21 May 2025	6 Mar - 4 Jun 2025	4 June 2025	\$18,000
<b>2nd cohort</b>					
<b>Part A</b>	5 August 2025	20 October 2025	5 Aug - 3 Nov 2025	3 November 2025	\$15,000
<b>Part B (S1)</b>	6 August 2025	21 October 2025	6 Aug - 4 Nov 2025	4 November 2025	\$18,000
<b>Part B (S2)</b>	7 August 2025	22 October 2025	7 Aug - 5 Nov 2025	5 November 2025	\$18,000

\*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 TTC Examination.

\*Individuals who have completed any TTC Course (Part A after March 2024 or Part B after June 2024) but did not pass the examination may directly enrol for a retake. For examination details, please [click here](#). To enrol, please [click here](#)."

## WAM Pilot Programme



Each eligible participant will be reimbursed **80%** of course fees upon satisfactory completion of eligible courses, subject to **a cap of \$15,000** per person for the entire duration of the Scheme (i.e. from 1 October 2016 to 31 March 2026).

**Enquiry**

**CTP**

**TTC**

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