



香港信託人公會
Hong Kong Trustees' Association



2025

**EMPOWER YOUR FUTURE
LEAD WITH TRUST
BECOME A
CERTIFIED TRUST PRACTITIONER
AND EXCEL!**

CTP QUALIFICATION

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Introduction of HKTA

The Hong Kong Trustees' Association Limited (HKTA) was established in 1991 by pioneers in the trust and fiduciary services sectors. Today, it serves as a leading professional body for Hong Kong's trust and fiduciary industry, specialising in legislative advocacy and educational initiatives.

OUR MISSION

- Advance the trust and fiduciary industry by promoting the highest standards of professionalism, robust corporate governance and rigorous regulatory compliance;
- Contribute towards advancing the status of Hong Kong trust professionals and that of the industry internationally;
- Advocate for the trust and fiduciary industry with government bodies, the media, local and international professional organisations and the public. Promoting Hong Kong as a premier global hub for trust and fiduciary services, highlighting its expertise and capabilities in this sector;
- Promote the highest standards for the industry by the issuance of Best Practice Guides applicable to corporate trusts, pension schemes, private trusts/ family offices and charitable trusts;
- Contribute towards enhancing the education and knowledge of practitioners in the trust industry through relevant trust accreditation and training programmes;
- Contribute towards enhancing public education on trust fraud awareness and prevention.



Shining a Spotlight on the Thriving Future of Trust and Fiduciary Industry

THE TRUST INDUSTRY NAVIGATES A RAPIDLY EVOLVING GLOBAL LANDSCAPE, IT IS POISED FOR SUBSTANTIAL GROWTH AND TRANSFORMATION.



According to our Hong Kong Trust Industry Spotlight 2025, jointly published with KPMG, Hong Kong's trust market grew by 10% from 2021 to 2023, with HK\$5,188 billion (US\$667 billion) of assets held under trusts at the end of 2023, compared with HK\$4,719 billion (US\$606 billion) when the previous HKTA-KPMG report was issued in 2021.

Market growth is driven by heightened regulatory compliance, the increasing wealth of high-net-worth individuals and families, especially in emerging markets across Asia, family office developments, expanding intergenerational transfer of wealth and the increasing popularity of alternative investments, such as virtual assets leading to a rising demand for professional fiduciary services.



With immense opportunities and a complex financial landscape to navigate, its future is promising and prosperous, making this field a dynamic and rewarding career choice.

WHY ARE TRUST INSTRUMENTS CLOSELY CONNECTED TO EVERYONE'S LIFE?

Trusts Instruments
can be used for
various purposes:

Special
Needs
Planning

Tax
Planning

Estate
Planning

Asset
Protection

Business
Succession

Charitable
Giving

Investment

Provide
employee
benefits and
retirement
benefits

THE BREADTH OF THE TRUST INDUSTRY ENCOMPASSES MULTIPLE SECTORS.

A trust professional can pursue a diverse range of roles across various fields, including but not limited to the following areas:-

-  Corporate trustees for funds and retirement schemes
-  Compliance
-  Regulators
-  Asset & wealth management
-  Family offices
-  Banking
-  Law firms
-  Insurance companies
-  Charitable foundations
-  Private trust companies





**HKTA is dedicated to
supporting the trust
and fiduciary sector
through education
and representation
in discussions with
government and
regulators.**

Certified Trust Practitioner™ Accreditation Program



**CERTIFIED TRUST PRACTITIONER™
ACCREDITATION PROGRAM WAS LAUNCHED
BY THE HONG KONG TRUSTEES' ASSOCIATION
ON 1 JULY 2018.**



The accreditation program was introduced in order to:

- ➡ develop talent within the trust and fiduciary services industries in Hong Kong in a systematic manner;
- ➡ set minimum professional standards within the trust industry;
- ➡ encourage new entrants to the industry and provide a platform for opportunities of career advancement; and
- ➡ promote confidence of clients, financial service sectors and regulatory bodies in fiduciary services through setting professional standards and competency of individuals working in the trust industry.

Certified Trust Practitioner™ designation will be awarded to individual members of the Hong Kong Trustees' Association who have satisfied the **Certification**, **Experience** and **Membership** requirements.



Certification



Experience



Membership



”

I GAINED
PROFESSIONALISM
AND A WEALTH OF
KNOWLEDGE TO BE A
TRUST PRACTITIONER.

William Wong, CTP
2023 TTC Graduate
Senior Tax Manager
Deloitte Advisory Hong Kong

WHY PURSUE CTP CERTIFICATION?

- Gain recognized expertise of professionalism and in trust and fiduciary services, particularly in Hong Kong
- Significantly boost your professional credibility with clients and employers
- Stand out from the competition and access premium career advancement opportunities
- Join an elite group of trust professionals



HKTA
Certified Trust Practitioner

Choose a CTP route that suits you

Certified Trust Practitioner™



MEMBERSHIP

Join as HKTA individual member

EXPERIENCES

2 years hands-on relevant trust related experience



TTC GRADUATE

Complete and Pass both Part A & B exams



TRUST TRAINING CERTIFICATE



01

02

EXPERIENCED PRACTITIONER EXEMPTION



EXPERIENCES

10 years hands-on relevant trust related experience



Route 1 – Trust Training Certificate

OVERVIEW

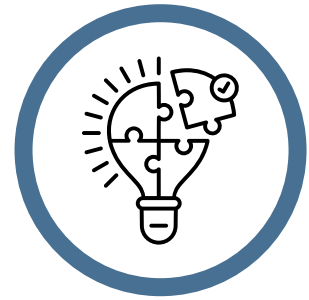
The Trust Training Certificate (“TTC”) course was developed by the HKTA in conjunction with the Hong Kong Securities and Investment Institute to bridge the knowledge gap launched in 2018. It is the first trust training course in Hong Kong with comprehensive coverage of topics including trust set up and administration, compliance, estate planning, family office, collective investment schemes and retirement schemes (MPF/ORSO) and comparison of HK with other trust jurisdictions. Traditionally trust experience is gained by on-the-job training, there is a demand for more formal and practical education in light of increasing regulation and the need for consistency. Training needs to be broad-based because of different trust types and broad applications.

“

The TTC program let me join a new world in financial industry which may be a bit vague to me in the past. The content is very useful for an novice.

Ricky Ngan, CTP
2022 TTC graduate
Founder and CEO
Tengard





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

TARGET AUDIENCE

- 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

Benefits of TTC

- ✓ **Comprehensive Curriculum**
Gain in-depth knowledge of private trusts, corporate trusts, funds, pensions, family office, tax and compliance
- ✓ **Expert-Led Training**
Our course is led by industry experts with extensive experience in trust management and administration. Benefit from their insights and real-world applications
- ✓ **Continuing Professional Development**
Gain the equivalent CPT / OPT / CPD hours recognised by the Securities and Futures Commission, the Law Society of Hong Kong, Mandatory Provident Fund Schemes Authority, Private Wealth Management Association and HKTA upon successful completion.
- ✓ **Flexible Learning Options**
We offer online training format to fit your busy schedule. Learn at your own pace and convenience

”

Through the TTC program, I have attained relevant, broad based knowledge and core competency in trust applications essential to practicing.

Carlie Wong, CTP
2022 TTC graduate
High Net Worth Manager
BOC Group Life Assurance



PROGRAMME STRUCTURE

The TTC course is structured in 2 parts, Part A and Part B. Part A covers an introduction and fundamental concepts of trusts. There are two streams under Part B to allow streaming into areas of interest or practice - Stream 1: Private Trusts and Stream 2: Collective Investment Schemes ("CIS")/ Retirement Schemes. Participants who successfully complete the programme and pass the examination for both parts will be awarded the "Trust Training Certificate".





Enhanced Expertise



Programme Outline

Part A

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



**Scan the
QR code
to view the
detailed syllabus**



Scan the
QR code
to view the
detailed syllabus



Part B Stream 1: Private Trusts

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



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

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



**Scan the
QR code
to view the
detailed syllabus**

Exam overview

BOOST YOUR PROFESSIONAL CREDIBILITY



Individuals are required to complete all seven units of corresponding TTC Course within three years, counting from the first unit attended up to five working days before sitting the examination.

MODE:

Computer-based Examination (CBE)

FORMAT:

Multiple-choice question (MCQ)

EXAMINATION QUESTION LANGUAGE:

English

NUMBER OF QUESTIONS:

60 Questions

DURATION:

90 minutes for each paper

PASS MARK:

70% for each paper

EXAMINATION FEES:

HKD2,200 for each paper

FREQUENCY:

Thrice a year, with one retake examination available for each session.

RETAKE EXAMINATION:

It is scheduled to take place one month after the initial examination, with enrolment starting on the day after the initial examination.

2025 2nd cohort

Schedule

	Enrolment Start date	Enrolment Deadline	Study Period	Examination* (Time: 5:30pm)
Part A	5 August 2025	20 October 2025	5 Aug 2025 - 3 Nov 2025	3 November 2025
Part B (S1)	6 August 2025	21 October 2025	6 Aug 2025 - 4 Nov 2025	4 November 2025
Part B (S2)	7 August 2025	22 October 2025	7 Aug 2025 - 5 Nov 2025	5 November 2025



Package Fee (Training + Exam)

- Part A: HKD15,000
- Part B (S1/S2): HKD18,000



Standalone unit Fee

- Part A:
Unit 1-5 & 7: HKD2,000 per unit;
Unit 6 HKD2,500 per unit
- Part B: HKD2,500 per unit



Study pack

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



Student support

Email HKTA for any questions on the content



Enjoy discounts on the course fee for corporate group enrolments completing the training package (with/without examination):

3-5 staff 5% off

>5 staff 10% off



We are here to support you and your career development.

Enrol Today!



Study hours

Part A: 21 hours

(total 7 units, 3hours/ unit)

Part B: 21 hours

(total 7 units, 3hours/ unit)



eCourse

format



Virtual 100%

access anytime and anywhere



Medium of Instruction

English



CPD Accreditation

- HKTA: 21.0/part A&B
- SFC: 21.0/part A&B
- PWMA: 21.0/part A&B
- Law Society: 21.0/part A&B
- MPFA core CPD: 3.0/unit for Unit 21 & 22



Financial subsidy

WAM Pilot Programme



Certificate

Collectively all units completed from Part A and 7 completed units from Part B, form the full course. To be awarded the Trust Training Certificate, individuals are required to complete all seven units of corresponding TTC Course within three years, counting from the first unit attended up to 5 working days before sitting the examination and the Part A and Part B of TTC Examination **within six years** from the date of the first class of TTC course.

Re-take Examination schedule 2025

Fast Retake examination is now available! It is scheduled to take place one month after the initial's examination.




	Re-take Examination Enrolment Period (till 23:59)	Re-take Examination Date (Time: 5:30pm)
Part A	4 November 2025 - 28 November 2025	3 December 2025
Part B (S1)	5 November 2025 - 29 November 2025	4 December 2025
Part B (S2)	6 November 2025 - 30 November 2025	5 December 2025

Financial Incentive Scheme of the WAM Pilot Programme

This course has been approved as an eligible course of the Financial Incentive Scheme for Professional Training under the Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector. As the Scheme will conclude on 31 March 2026, the Scheme will cease accepting applications in an orderly manner. The Scheme will not accept reimbursement applications for courses completed after 31 December 2025, and All reimbursement applications submitted after 31 January 2026 will not be accepted.



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).



**Together, we will
continue to uphold
the highest standards
of our profession and
strive for greater
achievements in the
years ahead.**

Route 2 - Experienced Practitioner Exemption

The HKTA recognizes that there are many experienced practitioners in the trust industry in Hong Kong.

We understand that they do not wish to sit through 42 hours of lectures and take examinations on subjects on which they are already well versed, but would like to receive the CTP designation. HKTA has therefore made available an Experienced Practitioner Exemption (“EPE”). Industry participants qualifying under the EPE will be awarded the CTP designation. The CTP designation given under the EPE route will apply continuously, provided certain criteria (as set out below) are met by the CTP holder.



Requirement 1

You need to have “relevant hands-on experience” in the trust industry.

“Relevant” experience may include experience in one or more of: private trusts, commercial trusts, unit trusts, corporate/bond trusts, pre IPO trusts, employee benefit /share trusts, retirement scheme trusts, or acting as trustee.

“Hands-on” experience means that you are currently, or have, not longer than 3 years ago, been actively engaged in the management, supervision, structuring, establishment and/or ongoing administration of the trusts mentioned above and /or acting as trustee thereto.



Requirement 2

You will also need to satisfy one of the following conditions regarding your length of experience:

1

You will need at least 10 years of relevant hands-on experience in Hong Kong; or

2

At least 10 years of overall relevant hands-on trust industry experience across other jurisdictions with a minimum of 2 years' relevant hands-on experience in Hong Kong; or

3

At least 10 years of overall relevant hands-on trust experience outside Hong Kong, plus have been awarded the TEP STEP designation, plus have undertaken Unit 6 (Trusts and Compliance) of the HKTA TTC course; or

4

You have a law degree specialising in trusts and have at least 2 years relevant hands-on experience in the trust industry and you have undertaken Unit 6 (Trusts and Compliance) of the HKTA TTC course; or

5

You have 7 years relevant hands on experience in the trust industry and you have undertaken and have successfully passed all of Part A units of the HKTA TTC course including the Part A examination; or

6

You have at least 5 years relevant hands-on experience in the trust industry, have successfully undertaken all units of Part A of the HKTA TTC course and passed the Part A examination and you have lectured on at least two topics in Part B of the HKTA TTC course and have achieved a satisfactory lecturer rating by students.



Requirement 3

You will need at least 3 referees to support your application.

1

Two referees must be provided by HKTA members who are CTPs and who are familiar with and can attest to your experience. A list of CTPs is available on the HKTA website.

2

The third referee should be a senior person (director/CEO) from your work organization who is familiar with your experience and job role and can attest to your relevant hands-on experience. As the new registration process for TCSP's is already in place, the reference from your workplace must be provided by or endorsed by one of the directors who is recorded as fit and proper on the TCSP registration for your organization.

Please note that if your hands-on experience under Requirement 2 has been completed with different employers, you will need to obtain additional references from your previous employers sufficient to cover the required length of experience.



Requirement 4

You must be an individual member of the HKTA.

Become a HKTA Individual member



JOIN OUR PROFESSIONAL COMMUNITY

HKTA Individual Membership

Any individual working in the trust related industry including but not limited to the trustee services, pensions, private banking, family offices, asset servicing, legal, accounting and other professional services fields.



Annual membership fee: HKD2,000
CTP annual fee HKD1,000
EPE application fee: HKD5,000

Benefits of **HKTA** member



Recognition

Signifies your commitment to the trust and fiduciary services industry, enhancing your professional reputation.



Special rates for training programmes

Special member rates are applicable to HKTA or other professional bodies' seminars and events.



Networking Opportunities

Access to a network of professionals and industry leaders, facilitating connections that can lead to collaboration and career growth.



Exclusive members' events

Offer members-only events that provide a unique chance to connect and collaborate with fellow industry experts, key regulators, and government officials.



Advocacy and Representation

A vital platform for members to raise issues and concerns, facilitating discussions on industry developments both locally and internationally. As a strong advocates for its members, HKTA represents their interests by engaging with regulators and policymakers on matters impacting the trust & fiduciary industry and cementing Hong Kong as a global trust hub.



Access to Industry Publications

Stay updated with the latest developments in the trust sector by receiving consultation papers, reports, and other relevant publications.



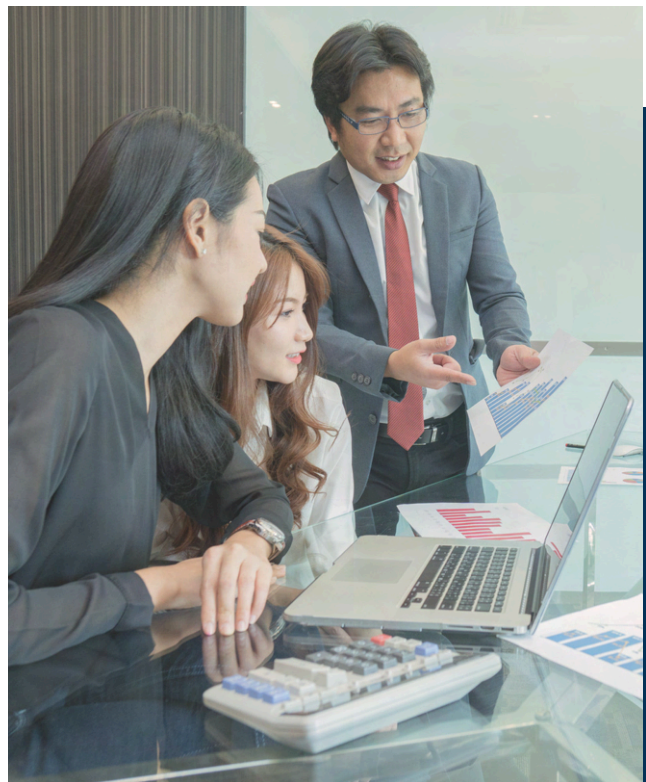
Professional Development

HKTA individual members who are Certified Trust Practitioners (CTPs) are required, during a calendar year, to obtain a total of 6 CPD points on trust related topics for the purpose of annual renewal of CTP certificate. Each CPD year start from 1 January to 31 December. All newly approved CTPs are required to fulfil their CPD hours in the following calendar year.

For example - CTPs who are approved in 2025, they are required to complete the 6 CPD points by the end of 2026. No CPD points can be carried forward to the next calendar year.

The Professional Development and Training Sub-Committee will consider granting CPD points for seminars organised by other organisations on a case-by-case basis.

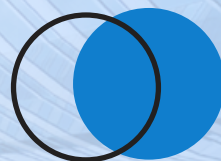
All CTPs are obligated to keep records (e.g. attendance certificates or other documentary evidences) about completion of the seminars/ conference. These records may be required to be produced for the purpose of verification of CPD hours acquired. All CTPs are required to submit declaration form to the HKTA Secretariat by end of January each year to confirm the CPD points they acquired from previous calendar year for the purpose of CTP certificate renewal.



For CTPs who fail to fulfil the outstanding CPD points by end of the grace period (i.e. end of March of the following year); or who provide misleading, incorrect or false information, such incidents will be reported to the Executive Committee. Their CTP certificates may be cancelled.

Stay connected

Let's grow
together.



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Hong Kong
Trustees' Association