



ABA WEALTH & TRUST SCHOOLS

INTERESTED IN ABA'S CTFA?

Your path to the **Certified Trust and Fiduciary Advisor (CTFA)** designation starts here.

BUILD A SOLID FOUNDATION

Level 1

Oct. 16-20, 2023 | Atlanta, GA

Acquire a deeper understanding of the fundamentals. Learn how to better plan and advise on solutions that contribute to clients' financial success.

You'll learn the latest strategies in:

- Integrated wealth planning and advice
- Asset management
- Trust administration
- Fiduciary relationship management
- Fiduciary risk and compliance
- Fiduciary principles

Class highlights:

- Fiduciary Ethics
- Account Acceptance and Termination
- Client Engagement and Emotional Intelligence
- Economics and Markets

“It helped me connect a lot of dots with the what and why of the work that I am doing on a daily basis.”

HONE YOUR EXPERTISE

Level 2

Nov. 7-16, 2023 | Virtual

Build on foundational concepts to further develop proficiency and learn how to implement your new knowledge.

Class highlights:

- Special Needs Trusts
- Developing a Personalized Wealth Management Strategy
- Generation-Skipping Transfer Tax
- IRAs and Qualified Retirement Plans

Your Path to the CTFA

The curriculum for Level 1 and Level 2 includes topics you'll find in the exam for ABA's Certified Trust and Fiduciary Advisor designation — helping you achieve certification faster.

Bundle Level 2 registration + online exam prep + the exam to streamline your learning and save!

Visit aba.com/WTSprepare to learn more

GET SOLUTIONS FOR COMPLEX NEEDS

Advanced

Oct. 16-19, 2023 | Atlanta, GA

In-depth sessions with discussion and case study analyses will help you craft complex investment strategies and develop and deliver full and balanced advice.

Class highlights:

- Environmental Liabilities of Fiduciaries
- Managing the Dynamic Nature of Client Financial Needs
- Importance of Proper Titling of Assets and Regular Titling Reviews
- Philanthropic Planning

“The designation of Certified Trust and Fiduciary Advisor not only indicates my expertise and commitment to the industry, it is an important accomplishment recognized at my firm and significant for my professional development.”

Demonstrate Your Expertise with the CTFA

Differentiate yourself from the competition with just four letters: CTFA. The ABA Certified Trust and Fiduciary Advisor designation is the most rigorous industry-recognized credential for wealth and trust advisors that speaks to your proficiency in providing wealth and trust advice.

A CTFA demonstrates your expertise in:

- Fiduciary principles and applications
- Integrated planning and advice (financial and tax)
- Asset management — interaction of all asset types
- Administration of trust accounts
- Risk/compliance management
- Ethics
- Relationship management

Earn the CTFA in four steps:

- Meet the eligibility requirements
- Prepare for the exam with ABA's online prep course
- Choose an exam date and apply for the exam
- Take the exam

Take Client Relationships and Your Career to the Next Level

ABA Wealth and Trust Schools offer in-depth knowledge and skills that will deepen your client relationships, address the unique needs of today's clients — and advance your career.

The curriculum focuses on identifying and addressing clients' financial needs through engaging discussions, real-world insights and case study analyses. You'll learn from a best-in-class faculty of experienced practitioners and work in cohort teams to maximize peer engagement.

Visit aba.com/WTSp to learn more

The best in wealth and trust deserves the best training



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