

# AIB PERSONAL TRUST DIPLOMA



NAME \_\_\_\_\_

DATE \_\_\_\_\_

The AIB Personal Trust Diploma was developed to prepare individuals for professional certification as a Certified Trust and Financial Advisor (CTFA), through the Institute of Certified Bankers (ICB). Becoming a Certified Trust and Financial Advisor is an important career decision for a trust professional and offers both a competitive advantage and professional recognition.

The 20 trust courses in the three curricula, Building Trust Expertise Levels 1 – 3, provide the technical underpinning of the diploma and address the core knowledge areas of the CTFA examination. In addition, the critical importance of ethical conduct in all aspects of the trust profession is reinforced in Ethical Issues for Bankers.

While the curriculum addresses the major knowledge areas assessed by the examination, ICB emphasizes that completion of this diploma does not guarantee success on the CTFA examination. Experience and application of the knowledge to the work setting are important factors as well.

## Required Courses

You must complete the following courses.

Grade	Course	Delivery
	Ethical Issues for Bankers	
<b>Building Trust Expertise Level 1</b>		
	Introduction to Estate Planning	
	Introduction to Investment Management	
	Introduction to Trust Administration	

Grade	Course	Delivery
<b>Building Trust Expertise Level 2</b>		
	Discretionary Distributions	
	Estate Planning for Marital Deduction	
	Estate Planning Overview	
	Federal Estate and Gift Taxes	
	Fiduciary Income Taxes	
	Fiduciary Law	
	Investments I	
	Managing Trust Accounts	
	Retirement Planning	

Grade	Course	Delivery
<b>Building Trust Expertise Level 3</b>		
	Estate Planning Case Study	
	Estate Planning for the Business Owner	
	Estate Planning for Charitable Giving	
	Estate Planning for Lifetime Gifts	
	Financial Planning Skills	
	Generation Skipping Transfer Tax	
	Investments II	
	Life Insurance and Annuities	

AIB Diploma Code: 67

# AIB

## LEGEND



Classroom Training Materials



Correspondence Course



Instructor-led Online Training



Reference Materials



Self-paced Online Training



ICB Approved