

## Certified Trust Practitioner™ Application Form

### A. Personal Particulars

Name: \_\_\_\_\_ (English) \_\_\_\_\_ (Chinese)

(The CTP certificate shall bear the name stated above, please provide your name as in HKID card/Passport)

HKID/ Passport No.: \_\_\_\_\_ Contact No.: \_\_\_\_\_

Correspondence Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

### B. Employment – Current position

Job Title: \_\_\_\_\_ Date of Commencement: \_\_\_\_\_  
(dd/mm/yyyy)

Company Name: \_\_\_\_\_

Contact No.: \_\_\_\_\_

Types of business of current employer (please tick any which is/are applicable)

☐ Private Trusts   ☐ Unit Trusts/Fund services   ☐ ORSO retirement schemes   ☐ Banking services  
☐ MPF retirement schemes   ☐ Estate planning   ☐ Legal services   ☐ Custody   ☐ Family office  
☐ Company secretarial services acting as trustee   ☐ Commercial trusts/escrow  
☐ Other (please specify: \_\_\_\_\_)

### C. Route of application (Please tick as appropriate)

☐ Experienced Practitioner Exemption (EPE)<sup>1</sup>

☐ Trust Training Certificate (TTC) graduates with 2 years' relevant working experience<sup>2</sup>

<sup>1</sup> Experienced practitioners in trust industry can apply for CTP through this route

<sup>2</sup> Relevant working experience Include private trusts; unit trusts; fund services; ORSO retirement schemes; banking services; MPF; Estate planning; custody; legal services; Family office; Company secretarial services acting as trustee; commercial trusts/escrow

**D. Full employment record todate (in chronological order)**

(Please provide the information on separate sheets if there is insufficient space)

Company Name	Job Title	Employment Period (dd/mm/yyyy)	Acquired hands-on relevant experience (please tick any which is/are applicable)
			<input type="checkbox"/> Private Trusts <input type="checkbox"/> Unit Trusts/Fund services <input type="checkbox"/> ORSO retirement schemes <input type="checkbox"/> Banking services <input type="checkbox"/> MPF retirement schemes <input type="checkbox"/> Estate planning <input type="checkbox"/> Legal services <input type="checkbox"/> Custody <input type="checkbox"/> Family office <input type="checkbox"/> Company secretarial services acting as trustee <input type="checkbox"/> Commercial trusts/escrow <input type="checkbox"/> Others, please specify: _____
			<input type="checkbox"/> Private Trusts <input type="checkbox"/> Unit Trusts/Fund services <input type="checkbox"/> ORSO retirement schemes <input type="checkbox"/> Banking services <input type="checkbox"/> MPF retirement schemes <input type="checkbox"/> Estate planning <input type="checkbox"/> Legal services <input type="checkbox"/> Custody <input type="checkbox"/> Family office <input type="checkbox"/> Company secretarial services acting as trustee <input type="checkbox"/> Commercial trusts/escrow <input type="checkbox"/> Others, please specify: _____
			<input type="checkbox"/> Private Trusts <input type="checkbox"/> Unit Trusts/Fund services <input type="checkbox"/> ORSO retirement schemes <input type="checkbox"/> Banking services <input type="checkbox"/> MPF retirement schemes <input type="checkbox"/> Estate planning <input type="checkbox"/> Legal services <input type="checkbox"/> Custody <input type="checkbox"/> Family office <input type="checkbox"/> Company secretarial services acting as trustee <input type="checkbox"/> Commercial trusts/escrow <input type="checkbox"/> Others, please specify: _____

**E. Academic Record**

Name of University/ Institute	Name of Award	Award Date

**F. Professional Qualifications**

Name of Professional Body	Designation	Award Date

**G. Personal Information Collection and Data Privacy Statement**

The Hong Kong Trustees' Association undertakes to keep your personal information confidential, stored in a secure environment, and shall not use your personal data for any purpose other than that intended by this application, without your express permission.

H. **Referees**

**Note: TTC graduates only need to provide ONE referee (either current employer or a HKTA member). EPE applicants need to provide THREE referees (current employer and HKTA members with CTP)**

**Referees One (to be completed by the Director/CEO/Supervisor of Applicant's Employer)**

Name: \_\_\_\_\_ (English) Job Title: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Email Address: \_\_\_\_\_ Contact no: \_\_\_\_\_

**Comments on applicant.** Please state the length of time you have been associated with the Applicant and in what capacity you are associated. If you consider the applicant's experience as relevant and appropriate to trusts, please describe the job activities of the Applicant and duration in the position(s).

**Signature**

**Date**

**Referee Two (HKTA member with CTP designation and having known the applicant for at least two years)**

Name: \_\_\_\_\_ (English) Job Title: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Email Address: \_\_\_\_\_ Contact no: \_\_\_\_\_

**Comments on applicant.** Please state the length of time you have been associated with the Applicant and in what capacity you are associated. If you consider the applicant's experience as relevant and appropriate to trusts, please describe the job activities of the Applicant and duration in the position(s).

**Signature**

**Date**

**Referee Three (HKTA member with CTP designation and having known the applicant for at least two years)**

Name: \_\_\_\_\_ (English) Job Title: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Email Address: \_\_\_\_\_ Contact no: \_\_\_\_\_

**Comments on applicant.** Please state the length of time you have been associated with the Applicant and in what capacity you are associated. If you consider the applicant's experience as relevant and appropriate to trusts, please describe the job activities of the Applicant and duration in the position(s).

**Signature**

**Date**

I. **Applicant Acknowledgement and Declaration**

(a) I hereby declare that the information contained in this Application Form is true and correct in all respects.

(b) In regard to Personal Information Collection and Data Privacy, in checking each box I hereby:

<input type="checkbox"/>	Authorise The Hong Kong Trustees' Association to share all information in connection with my application with the HKTA Accreditation Committee members, the HKTA Executive Committee, the Hong Kong Securities and Investment Institute and such other committees and/or designated persons as may be formed or required from time to time whose purpose is to access my eligibility for EPE from the TTC course, my CTP designation, or my ongoing requirements thereto.
<input type="checkbox"/>	Authorise The Hong Kong Trustees' Association and their delegated committee members to contact my referee(s) listed above, my previous employer(s), educational institute(s), industry association(s) or regulatory authority(ies) in order to verify the information provided in this application.
<input type="checkbox"/>	Undertake to update The Hong Kong Trustees' Association if there are any changes to my personal data or circumstances which may have a material impact on my CTP designation.
<input type="checkbox"/>	Agree that The Hong Kong Trustees' Association may contact me about seminars and courses they hold or which other associations may hold and which The Hong Kong Trustee' Association believe may be of interest to me.

(c) I confirm that I have read and understood the requirements and information in this form including the Personal Information Collection and Data Privacy Statement above and consent to the terms and conditions above.

<b>Applicant signature</b>	<b>Date</b>
----------------------------	-------------

Please send the applications with application fee and attachments to:

**Hong Kong Trustees' Association**

**Room 1103, 11/F, V. Heun Building, No 138 Queen's Road Central, Hong Kong**

If you have any queries about this form or the application in general please contact us at

[accreditation@hktrustees.com](mailto:accreditation@hktrustees.com) or 37035170.

**Checklist for CTP application**

	Item	EPE applicant	TTC Graduates	
1	Application fee (cheque to be made payable to " <i>HK Trustees' Association Limited</i> ")	HK\$5,000	HK\$1,000	
2	A copy of your HKID card / Passport	Required	Required	
3	A detailed CV which includes the following information :  a. full details of your academic and/or industry qualifications. Please include copies of your academic/industry certificates demonstrating the designation has been awarded.  b. full details of your current and previous job titles and the specific tasks you have performed in those roles and state whether you have undertaken that task or have manage/supervised that task.  c. State which industry associations you are a member of/director of and what contribution you have made to that association (committee work, seminars, lectures, exam setting etc.)	Required	N/A	
4	Completed CTP application with signature(s) of referees	Required	Required	
5	Copy of Trust Training Certificate (TTC)	N/A	Required	