

Trust Training Certificate Course Part A – Timetable

<u>Unit</u>	<u>Name</u>	<u>Module</u>	<u>Lecturer(s)</u>	<u>Date</u>	<u>Time</u>	<u>Accreditation</u>
1	Introduction to Trusts	M1 Overview of Trusts M2 Trustees' duties M3 Liability, variation and termination	Mr. Richard Grasby	2 Oct 2019 (Wed)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
2	Types of Trusts and when appropriate	M4 Types of Trusts and their uses M5 Retention of Control	Mr. Stefano Mariani Counsel, Deacons	3 Oct 2019 (Thur)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
3	Administration and Management of Trusts	M6: Administering Trusts	Mr. Richard Grasby	16 Oct 2019 (Wed)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
4	Other Estate Planning Vehicles	M7: Other Estate Planning/ Succession Vehicles Module 8: Trust Protection Issues	Ms Thelma Kwan Barrister-at-law	9 Oct 2019 (Wed)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
5	Trusts compared with other Estate planning vehicles	M9: Trusts compared with other estate planning vehicles	Patricia Woo Partner Squire Patton Boggs	11 Nov 2019 (Mon)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
6	Trusts and Compliance	M10: Compliance, AML, Legislative rules & how they apply to trusts	Christiaan De Bruyn Director – Trust Services, Trident Trust Company (HK) Ltd	30 Oct 2019 (Wed)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5
7	Trust Jurisdiction Comparison	M11: International Comparison on Trusts	Mark Lea Partner Lea & White	13 Nov 2019 (Wed)	6pm – 9pm	SFC:3.00 PWMA:3.00 Law Society: 2.5

Venue (Unit 1 to 4, 6 and 7): HKSJ Institute (Address: Room 501, 5/F, Wing On Centre, 111 Connaught Road Central, Hong Kong)

Venue (Unit 5): HKSJ Training Centre (Address: Classroom 4 – Preston Training Centre, Room 408-409, Fortress Tower, 250 King's Road, North Point, Hong Kong. Near exit B of Fortress Hill MTR station)