

## How to Become a Certified Trust Practitioner™ (CTP)

### Route 1: Trust Training Certificate Course

CTP designation will be awarded to individual members of HKTA who have satisfied the HKTA “CEM” requirements.

#### Requirements

- ▶ **Certification** - to be awarded the HKTA’s Trust Training Certificate (“TTC”) by attending and passing the training course.
- ▶ **Experience** - to gain a minimum of two years Relevant Hands-on Experience before, during or after study for the TTC course.
- ▶ **Membership** - join HKTA as an individual member. You must agree to all the standards and requirements of that membership including but not limited to Fit and Proper requirements and adherence to Best Practice Guidelines.

#### Relevant Hands-on Experience

Relevant Hands-on experience can be obtained in one or more areas and your experience should be related to the actual trust related work.

“**Relevant**” Experience may include experience in one or more of: private

trusts,  
commercial trusts,  
unit trusts,  
corporate/bond trusts,  
pre IPO trusts  
employee benefit trusts  
retirement scheme trusts  
acting as trustee

“**Hands-on**” Experience means that you are currently, or have been, not longer than 3 years ago, actively engaged in the management, supervision, structuring, establishment and/or ongoing administration of the trusts mentioned above and /or acting as trustee thereto for a minimum period of 2 years.

## How to Apply

If you have satisfied the criteria set out above, please:

- i. complete the Application Form - Certified Trust Practitioner™,
- ii. attach a copy of your Trust Training Certificate,
- iii. attach a copy of your completed HKTA individual membership application form, and
- iv. enclose a cheque for HK\$1,000 payable to “**HK Trustees’ Association Ltd**”  
*(if you apply HKTA individual membership at the same time, please enclose a cheque for HK\$3,000 to “**HK Trustees’ Association Ltd**”)*

Send the completed documents to

**The Hong Kong Trustees’ Association**

Room 739, 7/F, Grand Millennium Plaza, 181

Queen’s Road Central, Hong Kong

Attention: **CTP Accreditation Committee**

If you have any queries on this form or the application in general, please contact us: Email:

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

## **Route 2: Experienced Practitioner Exemption**

Trust industry veterans may apply for the designation through **Experienced Practitioner Exemption** route. Experienced practitioners will generally need to have at least 10 years’ active experience in a trust related field before they can be considered for the EPE. Decisions on the granting of exemptions will be made by the HKTA “Membership Subcommittee”. There is an application fee of HKD5,000 under the EPE route. Please refer to [https://www.hktrustees.com/upload/accreditation/EPE\\_information\\_%28updated\\_2022%29.pdf](https://www.hktrustees.com/upload/accreditation/EPE_information_%28updated_2022%29.pdf) for more details.