

## ABA Online Review Course for the CTFA Examination

*(Deadline is one week prior to start date)*

Candidates who are planning on earning the prestigious Certified Trust and Financial Advisor (CTFA) designation from the Institute of Certified Bankers will find this course an additional resource and convenient way to review for the exam. It is designed as a companion study tool to the four-volume ABA Wealth and Advisory Personal Trust Series (WAPTS).

The study quizzes from the WAPTS workbooks are used in the online course computer-graded quizzes to provide instant feedback. Participants are encouraged to take the Pre-test for each exam section **first** to identify the areas where they should concentrate their study. After studying the various sections of the study guides, participants can take the review tests from each section. Access to all lessons and quizzes on the online course site is available for the duration of the course and until the date of the Individually Proctored Exam. As a capstone to the course, learners may take a sample exam modeled after the CTFA exam (which is not available in the WAPTS).

There is a discussion board for each section of the course with forums organized according to subject matter. In the discussion board, participants can post questions as well as share insights and review and discuss other student's questions and comments. Students also have the ability to Instant Message each other.

This is a self-paced online course that begins prior to the spring and Fall Individually Proctored CTFA exams.

Please note that this course is updated at the beginning of each calendar year.

<b>Price*</b>	\$1075 Nonmembers / \$795 Members (with textbook) \$260 Nonmembers / \$200 Members (without textbook**)	
<b>Course Length</b>	Self-paced; estimated completion is 8 to 12 weeks	
<b>Course Credits</b>	None	
<b>Prerequisites</b>	None	
<b>Required Software</b>	Microsoft Internet Explorer Browser 7.0 or Mozilla Firefox 2.0 or higher	
<b>Textbook**</b>	<i>Wealth and Advisory Personal Trust Series, 2009, ABA</i>	
<b>Start date/ Catalog #</b>	February 1, 2010	3005580
	June 7, 2010	3005588

### Audience

This course is designed for those preparing for the Certified Trust and Financial Advisor (CTFA) Exam. The Certified Trust and Financial Advisor (CTFA) is applicable to financial services professionals whose primary function and expertise focus on the provision of fiduciary services related to trusts, estates, guardianships and individual asset management accounts.

### Learning Objectives

At the end of the course, participants should be familiar with the following areas:

- Fiduciary and Trust Activities
- Tax Law and Tax Planning
- Investments Management
- Financial Planning

*\* Registration for one or more courses that include accompanying textbooks will also incur a shipping & handling fee.*

*\*\* The four-volume series of workbooks will be provided to participants and the cost is included in the price of the course. Those who already own the current series may purchase the online course independently using the "without textbook" option.*

