

AIB Trust Basics

(Registration deadline is one week prior to start date)

This AIB course provides you with an overview of the trust department in a commercial bank, including how it fits into the bank's overall operations, the services it provides, and generally how those services are delivered. Particular emphasis is placed on the importance of accumulating, preserving, and disposing of an estate.

Price*	\$505 Nonmembers / \$405 Members	
Course Length	16 Weeks	
Course Credits	AIB: 3.0; ICB: 45 CSP, CRSP, CTFA, CCTS	
Prerequisites	None	
Required Software	Adobe Acrobat Reader; Microsoft Internet Explorer Browser 7.0 or Mozilla Firefox 2.0 or higher	
Textbook	<i>Trust Basics: An Introduction to the Products and Services of the Trust Industry</i> , 4th edition, 2008, ABA	
Start Date/ Catalog #	February 8, 2010	3005426
	April 26, 2010	3005471
	July 19, 2010	3005515

Audience

Non-trust bank personnel and those who have recently come into the trust department in support positions, entry-level personnel, employee benefits, and corporate trust officers.

Learning Objectives

After completing this program, you will be able to:

- Explain the principles of estate planning and estate taxation
- Distinguish between types of assets and forms of property ownership
- Describe the purpose and scope of various agency relationships
- Define the basic concepts of stocks, bonds, mutual funds, and common trust funds
- Analyze a will and list the steps of the administration and settlement of an estate
- Distinguish the types of guardianships that exist and compare powers of attorney for property and healthcare
- Define what a personal trust is, reasons for having one, and the characteristics of a good trustee
- Explain the reasons for and tax concepts of gifting
- List the types of corporate retirement plans that exist and profile the establishment and administration of a retirement plan

Topics Covered

- Types of Assets and How They are Owned
- Investment Vehicles
- Agencies
- Principles of Estate Planning and Estate Taxation
- Wills and the Probate Process
- Guardianships and Advance Directives
- Personal Trusts: The Groundwork
- The Personal Trust Document
- Gifting
- Irrevocable Trusts
- Employee Benefit Trust and Agency Services
- Corporate Trust and Agency Services

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

