Wealth Management and Trust Training

Stay Ahead of the Change

With five generations of clients in today's market, there is no such thing as a 'one-size-fits-all' approach to wealth management. To help your advisors stay ahead of the change, turn to online training from ABA.

These enhanced offerings include seven new online certificate programs and nearly 60 flexible courses for your wealth and trust team. Ensure they are equipped with the latest knowledge to maintain, deepen and enhance client relationships, compete in today's market and excel as an advisor.

Prepare for the next era of wealth management with training built for today, and focused on tomorrow.

NEW

7 Wealth Management Certificates

✓ **Core Concepts for Fiduciary Advisors**
Designed to accelerate onboarding of professionals moving into fiduciary-based advisory roles

✓ **Fiduciary Principles and Ethics**
A comprehensive overview of fiduciary standards, rules and regulations designed to provide beneficiaries with the highest level of care and consideration by financial professionals

✓ **Fiduciary Relationship Management**
A deeper exploration of fiduciary relationships to prepare advisors to meet not only today's clients' needs, but also the needs of future generations

✓ **Asset Management**
A thorough study of financial and non-financial assets and how they work together in helping clients meet their financial goals

✓ **Trust Administration**
A review of common types of trusts developed for specific purposes, how these accounts are administered, and the risks associated with administration

✓ **Fiduciary Risk and Compliance**
A detailed overview of fiduciary risk management principles, and the federal regulations that guide bank policy and client engagement

✓ **Integrated Wealth Planning and Advice**
Core elements of wealth planning for taxes, education, insurance, retirement, wealth transition and philanthropy, aimed at helping clients achieve financial goals during their lifetime and beyond

CENTER FOR FINANCIAL TRAINING℠ INTERNATIONAL

Questions?
Connie Laguna
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(305) 237-3051

ABA TRAINING from the American Bankers Association

Wealth Management and Trust Training

Course Listing by Certificate

Core Concepts for Fiduciary Advisors

- Understanding Fiduciary Principles
- Applying Fiduciary Principles and Ethics
- Introduction to Integrated Planning and Advice
- Introduction to Investment Management
- Trust Fundamentals
- Introduction to Fiduciary Risk Management and Compliance
- Fiduciary Ethics

Fiduciary Principles and Ethics

- Understanding Fiduciary Principles
- Applying Fiduciary Principles and Ethics
- Fiduciary Ethics

Fiduciary Relationship Management

- Managing the Dynamic Nature of Client Financial Needs
- Know Your Competition
- Mastering the Art of Inquiry
- Engaging in Multigenerational Conversations with Clients
- Developing and Delivering a Compelling Personal Value Proposition
- Effective Client Engagement Through "Wealth Personas"
- Emotional Intelligence for Wealth Advisors
- Understanding Generational, Gender and Cultural Characteristics in Managing Wealth
- Engaging With Centers of Influence
- Interacting with Financial Advisors
- Selling Value

Asset Management

- Introduction to Investment Management
- Economics and Markets
- Importance of Proper Titling of Assets and Regular Titling Reviews
- Asset Allocation and Diversification
- Investment Policy
- Investment Products
- Sustainable and Responsible Investing
- Bond Selection and Analysis
- Stock Selection and Analysis
- Alternative Investment Products
- Developing a Personalized Wealth Management Strategy
- Investment Strategies for Inherited Wealth
- Prudent Portfolio Management
- A Deeper Dive into Non-Financial Assets

Trust Administration

- Trust Fundamentals
- Introduction to Trust Administration
- Duties and Powers of the Trustee
- Types of Trusts
- Discretionary Distributions
- Account Acceptance and Termination
- Estate and Probate Administration
- Special Needs Trusts

Fiduciary Risk and Compliance

- Introduction to Fiduciary Risk Management and Compliance
- Managing Fiduciary Risk and Litigation
- Fiduciary Compliance
- Environmental Liabilities of Fiduciaries

Integrated Wealth Planning and Advice

- Introduction to Integrated Planning and Advice

Tax Planning

- Individual Income Tax
- Fiduciary Income Tax
- Gift Strategy and Taxation
- Generation-Skipping Transfer Tax
- Federal Estate Tax

Insurance Planning

- Fundamentals of Insurance
- Life Insurance Policies
- Annuities

Retirement Planning

- Planning for Retirement
- Qualified Retirement Plans
- Individual Retirement Accounts

Estate Planning

- Estate Planning Fundamentals
- Estate Planning for the Marital Deduction
- Philanthropic Planning
- Education Planning for Minors
- Estate Planning for the Business Owner

Advising Clients

- Full Balance Sheet Advice
- Structure Analysis and Advice

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Wealth Management and Trust Training

All Online Training Courses

- A Deeper Dive into Non-Financial Assets
- Account Acceptance and Termination
- Alternative Investment Products
- Annuities
- Applying Fiduciary Principles and Ethics
- Asset Allocation and Diversification
- Bond Selection and Analysis
- Developing a Personalized Wealth Management Strategy
- Developing and Delivering a Compelling Personal Value Proposition
- Discretionary Distributions
- Duties and Powers of the Trustee
- Economics & Markets
- Education Planning for Minors
- Effective Client Engagement Through "Wealth Personas"
- Emotional Intelligence for Wealth Advisors
- Engaging in Multigenerational Conversations with Clients
- Engaging With Centers of Influence
- Environmental Liabilities of Fiduciaries
- Estate and Probate Administration
- Estate Planning for the Business Owner
- Estate Planning for the Marital Deduction
- Estate Planning Fundamentals
- Federal Estate Tax
- Fiduciary Compliance
- Fiduciary Ethics
- Fiduciary Income Tax
- Full Balance Sheet Advice
- Fundamentals of Insurance
- Generation-Skipping Transfer Tax
- Gift Strategy and Taxation
- Importance of Proper Titling of Assets and Regular Titling Reviews
- Individual Income Tax
- Individual Retirement Accounts
- Interacting with Financial Advisors
- Introduction to Fiduciary Risk Management and Compliance
- Introduction to Integrated Planning and Advice
- Introduction to Investment Management
- Introduction to Trust Administration
- Investment Policy
- Investment Products
- Investment Strategies for Inherited Wealth
- Know Your Competition
- Life Insurance Policies
- Managing Fiduciary Risk and Litigation
- Managing the Dynamic Nature of Client Financial Needs
- Mastering the Art of Inquiry
- Philanthropic Planning
- Planning for Retirement
- Prudent Portfolio Management
- Qualified Retirement Plans
- Selling Value
- Special Needs Trusts
- Stock Selection and Analysis
- Structure Analysis and Advice
- Sustainable and Responsible Investing
- Trust Fundamentals
- Types of Trusts
- Understanding Fiduciary Principles
- Understanding Gender, Culture and Generational Influences in Managing Wealth

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