CHARTERED TRUST & ESTATE PLANNER™

GLOBAL CERTIFICATION IN TRUST & ESTATE PLANNING

CONNECT YOUR CAREER TO THE WORLD

TRUST PLANNING & LAWS

ESTATE PLANNING & LAWS

INTRODUCTION

Entrepreneurs are very good at creating wealth, but often they are not as skillful and ignorant to the importance of preserving their wealth over multiple generations. Wealth Preservation, Wealth Transfer and Succession Planning are very technical issues which require in depth knowledge and specialized skills which need to be learnt and practiced for perfection.

Much of the wealth in the world will change hands over the next two decades from experienced family members who might be the creators of this wealth to newer generations that may not be prepared and might lack skills in managing and preserving the wealth. In developing world the rate of growth of wealth is higher than in the developed markets but advisors in these countries are not equipped with the requisite knowledge to enable their clients to find the best solution in transferring and preserving wealth over multiple generations

The key skills to advising High Net Worth Individuals (HNI's) about estate planning include family dynamics management, philanthropy planning and family governance structure planning. The above components of estate planning are assuming an equal and sometimes greater business opportunities for financial advisors, wealth managers, private bankers and legal counsels.

This important executive education program, Charted Trust & Estate Planner™ (CTEP™) Certification has been extensively remodeled for India and is designed to equip you with the skill and expertise to take your wealth management activities to the next level of professionalism.

AMERICAN ACADEMY OF FINANCIAL MANAGEMENT

AMERICAN ACADEMY OF FINANCIAL MANAGEMENT® (AAFM®, USA)

AAFM® is a renowned Global name in financial education with presence in 151+Countries and over 300000 Certificants Globally which is committed to make quality education available to everyone regardless of their geographical location and age limit. AAFM® offers exclusive certified designations, charters, and master's certification to candidates who meet the high standards. AAFM® now has representative offices in the US World Trade Center N.O. Center, Hong Kong, Beijing, India, Dubai, Kuwait, Latin America and South America, Singapore, The Caribbean, Europe, and more.

ACCREDITATION & RECOGNITION

AACSB

ACBSP

ISO 9001:2008 CERTIFIED

TÜV AUSTRIA ZERTIFIZIERT EN ISO 9001 20 100 151417160 ISO 29990 20 285 151427318

- Founded in 1996 – 23 Years Old Body
- 3,00,000 + Certificants Globally
- 50,000 + CWM® Globally
- Member Presence in 151+ Countries
- Offices in 17 Countries
- Global recognition agreement with AACSB and ACBSP Accreditation Agency.

AAFM INDIA AMERICAN ACADEMY OF FINANCIAL MANAGEMENT
GLOBAL LEADER IN FINANCIAL EDUCATION

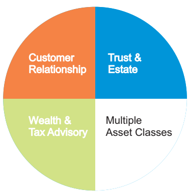
ABOUT AAFM INDIA

American Academy of Financial Management India Private Limited, AAFM India (AAFMI) was established under the banner of American Academy of Financial Management® (AAFM®), USA and started its operation in the year 2011 as its Indian Chapter with the objective to work in the Financial Services Domain as a Standard Setting Body in India to promote Wealth Management and Financial Advisory Services.

AAFM India is responsible for establishing Curriculum Design, Certification of membership and licensing standards in India.® AAFM India offers various Certifications, Designations and other Educational Programs offered by AAFM including the prestigious and highest designation globally recognized in the Field of Estate Planning "CHARTERED TRUST & ESTATE PLANNER™ (CTEP™)"

AAFM India closely works with the Regulators, Financial Services Organizations, Banks , Financial Advisors and Wealth Management Professionals.® AAFM's Chartered Wealth Manager® (CWM®) Designation Program is approved by National Institute of Securities Market (NISM) under the SEBI Investment Advisor Regulations 2013.

AAFM India is an accredited CPE Provider for NISM Certifications for Continuous Professional Education and has already trained 15,000+ Professionals and is present across India.



ESTATE PLANNING IN INDIA

Conflicts relating to succession are almost as old as recorded history. Most famous Indian epics have an undertone of problems related to, and the importance of succession. Problems in succession planning take many forms – 'The Aurangzeb syndrome' is a classic case of the potential heirs of the family fighting over the succession of the family estate – something that recurs fairly regularly in corporate India.

The number of affluent Indians has doubled over the past decade and many of them are entering or have already transitioned into retirement. Estate Planning is becoming increasingly necessary for these individuals to ensure a planned succession, avoid family feuds leading to disintegration of businesses and lengthy court battles. Also, if Estate Duty is reinstated in India today or in the near future, Estate Planning may turn out to be the best tool to minimize the Estate Duty.

Even today, many of India's wealthy do not even have a Will, which can lead to a number of issues at the time of succession of assets on the demise of the individual. When questioned, most ultra HNIs admitted to knowing what estate planning is, but we found that their familiarity, comfort and interaction with professional estate planners was low.

With the changing education paradigm in India, ultra HNIs are making way for the next generation in their enterprises quite early on. Successors are being inducted in businesses at an early age; they are getting involved across functions to understand nitty-gritties, and to build relationships with key people in an organisation.

Estate Planning services are provided by Wealth Management Divisions of Banks, Leading Law Firms, Family Offices and specialized organizations floated for Estate Planning Services.

SOME OF THE ESTATE PLANNING SERVICE PROVIDERS

- NexGen Estate Planning Solutions
- Kotak Mahindra Trusteeship Services
- IL&FS Trust Company
- Universal Trustees
- Warmond
- IIFL Wealth
- Amicorp Trustee India Pvt. Ltd.
- Barclays India
- Merrill Lynch Trust Services

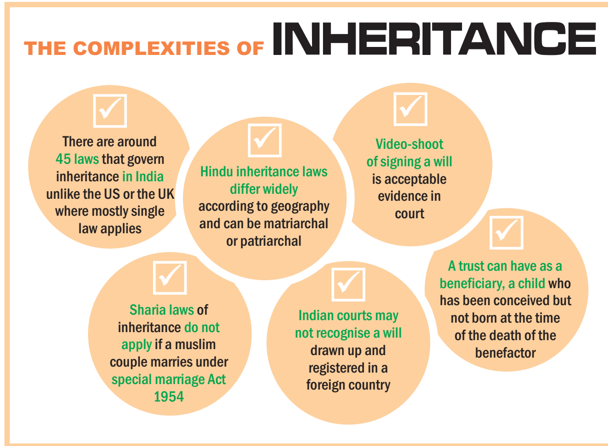
CTEP™
Trust & Estates
Chartered Trust & Estate Planner
AAFM Board Certification™

CHARTERED TRUST & ESTATE PLANNER™

Distinguish yourself with knowledge, expertise, and get a clear career advantage–become a CTEP™ Charterholder. CTEP™ Chartered Trust & Estate Planner is the globally recognized credential for professionals advising on Wills, Trusts, Estate Planning, Succession Planning & Inheritance Planning.

CHARTERED TRUST & ESTATE PLANNER™ (CTEP™) is unique and the only Trust Planning certification in India.

This certification comprehensively deals with all the aspects of Estate Planning And Trust Planning like Asset Protection, Intergenerational Wealth Transfer, Succession Planning, Creation of Wills & Trusts, Trust Management, International Trust Structures, Philanthropic Planning, Cross Border Estate Planning and Estate Tax Planning issues globally



WHAT WILL YOU LEARN ?

- ✓ Advise on the different types of wealth that may be transferred & Wealth Transfer Techniques.
- ✓ Start Catering to HNI & UHNI Clients along with your existing clientele on Estate Planning.
- ✓ Deepen relationships with high net worth clients and become a partner in planning.
- ✓ Consult on taxation and estate planning strategies that reflects the cross-border connections and wealth transfer alternatives available to wealth owners.
- ✓ Advise on the roles of Wills, Powers of Attorney, Living Wills and Probate in a wealth transfer plan.
- ✓ Learn more about Trusts, Estate Planning Process, Estate Planning Products, Tax Planning through Trusts etc.
- ✓ Drive the Set-Up of the Estate Planning advisory in Private Banking and Wealth Management Domains.
- ✓ Issues like how to create estate plans for minors, handicapped and other special situations.
- ✓ Philanthropy and Charitable Planning.

QUALITY APPROVED CONTROL

ENTRY REQUIREMENTS

- ✓ 12th pass, however certification will be provided on graduation.
- ✓ Graduates with recognized degrees / diplomas in Finance, Accounting, Economics or Business, etc.

CURRICULUM

Unit 1 - Introduction to Estate Planning	Estate Planning Process
Unit 2 - Legalities of Succession Planning	Succession Laws, Trust Laws
Unit 3 - Indian Taxation Laws	Tax Planning through Succession
Unit 4 - Trust Planning in India	Tax Planing through Trusts
Unit 5 - Advanced Estate and Succession Planning	Creating Estate Plan Solutions
Unit 6 - International Trust and Estate Planning	Cross Border Trusts & Estate Planning

BENEFITS OF CTEP™ DESIGNATION

The Certification in Trust and Estate Planning will help the "Finance Professional" to:

01

BRIDGE THE RELATIONSHIP GAP

Leverage the CTEP™ Designation to open new doors of HNI, Ultra HNI and Private Banking Clients, earn trust by sharing your expertise.

02

DISTINGUISH YOUR PRACTICE

Your ability to deliver "real value" further differentiates you from your competition. Your enhanced skills to advise on Estate, Trust and Succession Planning would help you to add new revenue streams to your business.

03

CREATE TOP-OF-MIND AWARENESS

Nurturing relationships with your client network is simplified by becoming a valuable resource on Trust and Estate Planning, a virgin area in Financial Advisory services in India.

04

CREATE ADDED VISIBILITY AND CREDIBILITY

It helps to enhance your visibility by offering additional services on wills, trusts & succession planning and enhance your credibility with a globally renowned CTEP™ designation.

05

INCREASE REVENUE

Estate Planning advisory is a niche area largely untapped with high growth potential & Estate Planning is one of the top paid specialization globally.

EXAMINATION

EARN THE CHARTER WITH A SINGLE EXAMINATION

- ✓ Only one Exam
- ✓ Flexible Examination Pattern
- ✓ Round the Year Examination
- ✓ 4500+ Test Centers
- ✓ MCQ based (Objective Type)
- ✓ No Negative Marking
- ✓ 2 Hours Examination
- ✓ Maximum of 150 Marks
- ✓ 50% Passing Marks

Examination Partners

All examination will be held at the center of Person Vue' test centers available worldwide

CAREER AVENUES

Trust and Estate Planning Offers career opportunities in Banks, Wealth Management Boutique Firms, Distribution Houses, Private Banking, Family Offices and Legal Firms. One of the most lucrative Career Option is to set up one's own independent practice as Estate Planner.

Trust and Estate Planning Professionals work as:

- ✓ Family Officers
- ✓ Private Bankers
- ✓ Wealth Managers
- ✓ Asset Managers
- ✓ Investment Bankers
- ✓ Private Equity Professionals
- ✓ Trust Officers
- ✓ Succession Planners
- ✓ Trust Advisors
- ✓ Professional Trustee
- ✓ Legal Professionals
- ✓ Accountants
- ✓ Consultants

As Estate Planning Skills are difficult to attain and hire Estate Planning professionals command high remuneration within the organizations they work.

WHO SHOULD PURSUE?

- ✓ Financial Advisors, Wealth Managers, Private Bankers, Relationship Managers, Legal Advisors & more.
- ✓ People from Banks, NBFCs, Broking Houses, Mutual Funds, Insurance and Distribution Houses.
- ✓ Suitable for all those with a finance background who wish to move into Trust & Estate Planning Business.
- ✓ Existing Trust & Estate Planners or professionals in similar fields who wish to cement their knowledge and also achieve client trust through most sought after professional designation & international certification.
- ✓ Product Heads and Managers who wish to learn or reinforce all the technical aspects of the business.
- ✓ Business Heads from Banks, Mutual Fund Houses, Distribution, Wealth Management, Family Office, Advisory firms etc.
- ✓ Independent Advisors who manage HNI & UHNI clients and wish to enhance their technical skills.
- ✓ Students undergoing their under graduate, post-graduation, professional courses, diploma, certifications and other designated courses.

STUDY AND LEARNING RESOURCES

CORPORATE MEMBERS

AAFM
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INDIA
GLOBAL LEADER IN FINANCIAL EDUCATION

+91 9650159583
+011 45120800

info@aafmindia.co.in
www.aafmindia.co.in

Office No - 403, ITL Twin Tower
Plot No. B-09 Netaji Subhash Place,
Pitampura, New Delhi - 110034