Introduction to Trusts - Online

Designed for banking professionals seeking to service the high net-worth market, this course explains the specific characteristics of trusts and the objectives that trusts can accomplish for high-net-worth individuals. It also explores the various types of trusts and their particular applications, concluding with the duties of a trustee.
This course replicates the content from lesson 1 of Overview of Trusts - Online
This is an asynchronous eLearning course that can be accessed 24/7 from any internet enabled computer. Subscription period for this course is 90 days.

Available Session(s):

Available Today Online Instructor(s):[]	Online	USD $60.00

Targeted Audience

banking professionals seeking to service the high net-worth market

Advance Preparation

No advance preparation required.

Learning Objectives

Students will be able to:
· Recognize what a trust is and why it is created
· Define and contrast types of fiduciary relationships
· Identify descriptions of interested parties of a trust
· Identify types of trustees, what they do, and how they are compensated
· Recognize types of trust documents and their use
· Identify what affects the term of the trust

Level: Basic

CPE Credits: 1

Instructional Method: Self-Study

Detailed Outline

Introduction to Trusts

· Definition of a trust
· Definition of a fiduciary relationship
· Interested parties: Beneficiaries, Remaindermen and Trustees
· The trust document and trust term

For more information regarding administrative policies such as complaints and refunds, please contact our offices at 212-641-6616.