ABA Wealth Advisory and Personal Trust Series

ABA has just released the 2010 edition of the Wealth Advisory and Personal Trust Series (WAPTS). The four workbooks are recommended for personal trust administrators, private bankers, portfolio managers, and other wealth advisors as a desk reference.

WAPTS is an excellent study resource for the Certified Trust and Financial Advisor (CTFA) exam. Each section in every workbook has chapter review questions and answers, a sample test and answers, and a list of additional resources on the Internet and in print. All four workbooks are the reading materials ABA Online Review Course for the CTFA Exam

Each workbook can be purchased individually for those concentrating on or needing a refresher on a specific area of the trust market. And all 4 workbooks in the series can be purchased at a discount:

The ABA Fiduciary and Trust Activities Workbook covers: Trust and Probate Law and Custom, Investment Responsibilities of a Trustee, Environmental Law, and Ethics.

ABA Fiduciary and Trust Activities Workbook, © 2010

$200 List Price

$150 Member Discount

The ABA Financial Planning Workbook covers: Personal Finance, Life Insurance, Other Types of Insurance, Retirement Planning, Estate Planning, and Ethics.

ABA Financial Planning Workbook, © 2010

$200 List Price

$150 Member Discount

The ABA Investment Management Workbook covers: Economics and Markets, Equity Markets, Debt Markets, and Portfolio Management, Alternative Investments, Investment Policy, Performance Measurement and Evaluation , and Ethical and Legal Consideration.

ABA Investment Management Workbook, © 2010

$200 List Price

$150 Member Discount

The ABA Tax Law and Tax Planning Workbook covers: Overview of the Current Tax Laws, Individual Income Tax, Income Taxation of Fiduciaries, Income Taxation and Charitable Entities, Federal Estate Taxation, Federal Gift Tax, Generation Skipping Transfer Tax, Planning for Gifts, Planning for Credit Shelter and Marital Trusts, Effective Planning for GST, Postmortem Planning, Planning for Retirement Benefits, Estate Planning for the Closely Held Business, Ethical Considerations.

DISCLAIMER: ABA will continue to monitor actions on Capitol Hill and advise you of any immediate changes. At this time it is our plan to publish a 2010 edition of the ABA Tax Law and Tax Planning Workbook by late-March of this year. The 2010 edition will address all current estate and gift tax laws in effect at that time.

ABA Tax Law and Tax Planning Workbook, © 2010

$200 List Price

$150 Member Discount

Purchase the entire ABA Wealth and Personal Trust Series at a discounted price.

$700 List Price

$525 Member Discount

Recommended as a desk reference for personal financial planners, retail bank officers becoming acquainted with investments, wealth management relationship officers, and trust administrators and as a study resource for the Certified Trust and Financial Advisor (CTFA) exam.

For more information, please contact **Lisa Phillips** at **Southeast Regional CFT**

lisaphillipscft@bellsouth.net **904-354-4830** **www.cft-flsc.org**