

AIB Certificates and Diplomas

AIB Personal Trust Diploma



*Advancing careers.
Developing talent.
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AIB Personal Trust Diploma

This diploma program was developed to prepare individuals for professional certification as Certified Trust and Financial Advisors (CTFA) via the Institute of Certified Bankers.

The trust courses in the three curricula - AIB Personal Trust Curriculum Level I, AIB Personal Trust Curriculum Level II and AIB Personal Trust Curriculum Level III - provide the technical underpinning of the diploma and address the core knowledge areas of the CTFA examination. In addition, the critical importance of ethical conduct in all aspects of the trust profession is reinforced in AIB Ethical Issues for Bankers.

AIB Ethical Issues for Bankers

AIB Personal Trust Curriculum - Level 1

- AIB Building Trust Expertise - Trust Administration
- AIB Building Trust Expertise - Taxation & Estates
- AIB Building Trust Expertise - Investment Management

AIB Personal Trust Curriculum - Level 2

- AIB Discretionary Distributions
- AIB Estate Planning for the Marital Deduction
- AIB Estate Planning Overview
- AIB Federal Estate and Gift Taxes
- AIB Fiduciary Income Taxes
- AIB Fiduciary Law
- AIB Investments I
- AIB Retirement Planning

AIB Personal Trust Curriculum - Level 3

- AIB Estate Planning Case Study
- AIB Estate Planning for Charitable Giving
- AIB Estate Planning for Lifetime Gifts
- AIB Estate Planning for the Business Owner
- AIB Financial Planning Skills
- AIB Generation Skipping Transfer Tax
- AIB Investments II
- AIB Life Insurance and Annuities

