CENTER FOR FINANCIAL TRAINING℠
SOUTHEAST REGIONAL

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ABA eLearning

FOR TRUST ADMINISTRATORS AND OFFICERS

Trust Administrators and trust officers manage accounts for which the bank serves as trustee, guardian or agent. Trust officers require a **deep understanding of estate planning and administration, financial planning, tax planning and strategies, investment management and fiduciary law.** They execute to fiduciary standards and are skilled in **determining customers' needs** and **identifying solutions** that work in the customers' best interest. Trust officers maintain **knowledge of laws and regulations** that govern the way in which trust accounts are established and managed. In some institutions, trust officers refer trust clients to other specialized departments within the bank to ensure the clients' insurance, borrowing, savings and investment needs are met.

ABA eLearning offers courses to build trust expertise specifically to introduce new trust administrators and officers to trust administration, estate planning and administration, tax planning and strategies and investment management. The self-paced online courses in the Building Trust Expertise (BTE) curriculum provide strong foundational knowledge and build the knowledge and confidence of your staff to work with high net worth clients, deliver superior client service, and expand your trust business. Additional courses address ethical requirements and also business skills needed to address existing and prospective customers in a professional manner whether through written communication or face-to-face.

Core Knowledge

- Discretionary Distributions
- Estate Planning Overview
- Introduction to Estate Planning
- Introduction to Investment Management
- Introduction to IRAs
- Introduction to Trust Administration
- Investments I
- Managing Trust Accounts
- Personal Tax Return Analysis
- Understanding Bank Products
- Understanding Financial Planning

Workplace Fundamentals

- Business Etiquette
- Dealing Effectively with Co-Workers
- Ethical Issues for Bankers
- Managing Time at Work
- Presentation Skills
- Sexual Harrassment in the Workplace
- Telephone Etiquette
- Writing Bank Correspondence

Sales and Customer Service

- Buildling and Retaining Customer Relationships
- Effective Referrals
- Event-Based Selling
- Introduction to Relationship Selling
- Referring Insurance and Annuities Customers
- Relationship Selling to Small Business Customers
- Revitalizing Customer Service
- Teleconsulting

American Bankers Association
ABA Professional Development