

## ABA eLearning FOR TRUST ADVISORS

Trust Advisors are fiduciary experts who **apply knowledge and skills in the area of trust and estate matters, investment management, wealth transition, and financial planning** to serve high net worth clients. Successful trust advisors contribute to the growth of the wealth management business by participating in and **initiating new client acquisition, expanding existing client relationships** by partnering with other bank professionals and identifying enterprise wide solutions to meet client needs. A Trust Advisor serves as **relationship manager** for a book of business; identifies and addresses issues affecting clients' accounts; and administers and distributes moderately complex accounts. Trust Advisors work with investment managers to assist in asset allocation strategies and are **responsible for corporate regulatory and compliance standards**.

ABA eLearning offers a suite of courses to build trust expertise and enhance a trust advisor's understanding of estate planning and administration, financial planning, tax planning and strategies, investment management and fiduciary law. The 20 self-paced online trust courses in the Building Trust Expertise (BTE) curriculum provide strong foundational knowledge in the core areas of trust administration and fiduciary law as well as detailed courses on the many options available to customers for financial, retirement and estate planning. Additional courses address the ethical requirements of bankers and the regulations that affect the products that are part of a customer's portfolio and the sharing of customer information.

### Core Knowledge

- Discretionary Distributions
- Estate Planning for Business Owner
- Estate Planning for Charitable Giving
- Estate Planning for Lifetime Gifts
- Estate Planning for Marital Deduction
- Estate Planning Final Case Study
- Federal Estate and Gift Taxes
- Fiduciary Income Tax
- Financial Planning Skills
- Fundamentals of Small Business Banking
- Generation Skipping Transfer Tax
- Introduction to IRAs
- Investments I and II
- Life Insurance and Annuities
- Managing Trust Accounts
- Personal Tax Return Analysis
- Retirement Planning
- Understanding Bank Products

### Workplace Fundamentals

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

### Sales and Customer Service

- Building and Retaining Customer Relationships
- Effective Referrals
- Event-Based Selling
- Introduction to Relationship Selling
- Relationship Selling to Small Business Customers
- Revitalizing Customer Service
- Teleconsulting