



Corporate Trust Courses

The following open enrollment courses will be offered for each of the three day courses with the third course having a fourth day for administering the CTMC exam in the morning. Each course will feature real life case studies to enhance learning. Each course will have a brief review quiz at the end of the three day course:

Corporate Trust I- Three days

- Role of the Trustee
- Laws and regulations
- Pre- closing duties
- Post-closing duties for administration
- Document review
- Case study-Putting a bond issue together from start to closing

Corporate Trust II- Three days

- Policies and procedures
- Audits and regulatory exams
- Risk management and compliance issues
- Defaults and bankruptcy
- Legal case law impacting Trustees
- Successor Trustee process
- Relationship management

Corporate Trust III- Three days and a fourth day morning exam administered for the CTMC certification

- Industry update on key developments impacting Trustees including regulatory focus; bond financing trends; system developments; global issues and competitor updates
- Securities market developments

- Review of administration issues both pre and post-closing
- Review of operations
- Review of laws and regulations
- Capital markets issues
- Day four administer 150 question exam multiple choice three hours from 9:00-12:00 for the CTMC certification

Course Schedule- Corporate Trust I- Kansas, City , MO June 2-4, 2020

Corporate Trust II- Kansas City, MO January, 2021

Corporate Trust III- Kansas City, MO June, 2021

Contact Jeff Powell of Corporate Trust Insights LLC for details:

970 672-8687 jeffpowell1948@gmail.com