



In House: Corporate Trust Master Certification Program and Grandfathering of the Certification

Description: The Corporate Trust Master Certification training program is designed to provide training for bankers and regulators engaged in the Corporate Trust business. Successful completion of the program will result in the awarding of the official designation of Corporate Trust Master Certification.

The training program will be delivered by Corporate Trust Insights LLC and consist of the following on site classroom training sessions:

- Corporate Trust I- Fundamentals of the Corporate Trust service including role of the Trustee; pre and post-closing duties; laws and regulations; debt products including municipal, corporate, structured, escrow services; and document review
- Corporate Trust II- Risk and compliance; bankruptcy and default; operations and administration responsibilities
- Corporate Trust III- Business strategy; case law update; system issues and thorough comprehensive review of administration, operations, laws and regulations in preparation for the exam administered at the end of class

Each course will be conducted for three days from 9:00- 4:30. The comprehensive exam will be administered on the fourth day after Corporate Trust III and is comprised of 150 multiple choice questions over three hours. Passing rate is 70%. Materials for all three courses will be provided including a study guide for Corporate Trust III for duplication by the client organization for each student.

Once a participant successfully passes the exam there is no continuing education requirement or annual dues assessed by Corporate Trust Insights LLC. The official designation as Corporate Trust Master Certification is permanent. The client organization may initiate its own continuing education. Corporate Trust Insights will provide continuing education and updates which are purely optional to the designation.

Benefits: The training will be comprehensive and comprised of topics which any Corporate Trust professional or regulator must master to be effective in the business from an administrative, operations, sales, risk, audit, compliance and management perspective. Other benefits include:

- The CTMC designation represents that the successful candidate has achieved a level of professional knowledge about the business.
- Training will be delivered on site to allow the students to minimize travel required, saving the time away from home and added expense of travel, meals and lodging.
- Each training session will be for three days instead of an entire week making it more concentrated and results in significant cost savings plus minimizing time away from the office.



- Training is conducted by current industry professional(s) who have extensive experience in the Corporate Trust business resulting in more relevant and up to date knowledge transfer emphasizing real life examples impacting the business today.
- Emphasis on proper risk management controls which will mitigate ongoing financial and legal risks for the business

Grandfathering of CCTS Designees: Corporate Trust Insights LLC will grandfather any current CCTS designees into the CTMC certification without requiring the taking of the exam

Corporate Trust Courses- For Virtual learning Webinars- A webinar program or a hybrid training option is available with in-person training at a selected site with other participants dialing in. Full virtual webinar training for the certification classes will be available on a case by case basis.

Corporate Trust Online Videos: Achieving the CTMC designation can be obtained by taking the Corporate Trust I and II courses of online videos plus contacting Jeff Powell for the exam review and exam delivery. Refer to the online video tab in this section for more information.

Flexibility: Corporate Trust Insights LLC will alter the above described three session training program in consideration of individual circumstances given the number of participants and experience levels or particular focus of the staff to be trained.

Contact Information: Any inquiries and questions can be directed to:

Jeff Powell, 970 672-8687 jeffpowell1948 @gmail.com

The CTMC program is designed to aid the Corporate Trust industry in achieving a level of education that will enable the providers of the business to be successful in a highly competitive and challenging environment. It is designed to provide the needed training now and into the future with the expert knowledge of myself, Jeff Powell, and my associates.

Sincerely,

Jeffrey J. Powell
President
Corporate Trust Insights LLC