



ATFA

ACCREDITED TRUST
FINANCIAL ADVISOR

“A New Gold Standard For Fiduciaries”



CAMPBELL
UNIVERSITY

Lundy-Fetterman
School of Business

CAMPBELL UNIVERSITY is proud to offer the ATFA Certification to the financial services industry and to fiduciaries nationwide. Over 1,000 trust professionals have acquired the ATFA Certification over the last decade and it is quickly becoming a new “Gold Standard” for true fiduciaries.

The ATFA Certification is available to ALL fiduciaries whether they are serving their clients with banks, credit unions, independent trust companies, broker affiliated trust companies, wealth advisory firms or law firms offering trust services. In an increasingly complex, litigious and regulatory environment, never has the need been greater for trust professionals well versed in, and with a demonstrated mastery of, the very highest level of fiduciary expertise. A trust professional holding the ATFA Certification will, in every sense have demonstrated that they are ready to face those challenges.

Why Campbell University

Campbell University has been the leader in trust education nationwide for over 50 years. As the first and only institution in the country to offer an undergraduate degree program in trust and wealth management, it additionally offers a Master of Trust and Wealth Management (MTWM). Today, almost 2,000 trust alumni serve the nation’s premier financial institutions as the senior managers of both today and of tomorrow.

The University, in conjunction with the Trust Education Foundation, hosts the Trust Advisors Forum at Pinehurst...the largest “trust” conference in the country. Campbell University also offers the Trust and Financial Advisors Institute (formerly known as Southeastern Trust School) now in its 51st year.

Campbell offering the ATFA Certification to the industry is a culmination of the University’s commitment to, belief in and love for the trust profession. It should also be noted that the fees associated with ATFA will flow into trust scholarships for the students majoring in trust at Campbell. That means that by pursuing and holding the ATFA Certification, you will be making an important investment in the future of the industry.



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Requirements for Acquiring the ATFA

There are several routes to acquiring the Accredited Trust Financial Advisor (ATFA)

FIDUCIARIES AT THE OFFICER LEVEL with ten or more years of experience in the financial services industry, with at least five of those years being in trust account administration:

1. Holding either an active ongoing fiduciary certification (licensed attorneys whose primary work focus is trust and wealth management are invited to apply)
- OR
2. Having graduated from Campbell's undergraduate or graduate Trust and Wealth Management Degree Program

are eligible to apply to be "grandfathered" and acquire the ATFA Certification without sitting for the ATFA examination. The work experience referenced above must be certified to by the applicant's current manager. The ATFA application for those requesting "grandfathered" status is available online and (during TAF) at the conference registration desk.

FIDUCIARIES NOT MEETING THE WORK EXPERIENCE REQUIREMENT TO "GRANDFATHER" must successfully complete:

1. Trust Advisors Institute – **Fiduciary Fundamentals**
2. Trust Advisors Institute – **Advanced Practices**, and
3. **The ATFA Examination**



GRADUATES OF EITHER CAMPBELL'S UNDERGRADUATE OR GRADUATE TRUST AND WEALTH MANAGEMENT DEGREE PROGRAMS are

immediately eligible to sit for the ATFA Examination upon graduation and will be granted the ATFA certification once they have completed three or more years of experience in the financial services industry, with at least two of those years being in trust account administration. The work experience referenced above must be certified by the applicant's current manager.

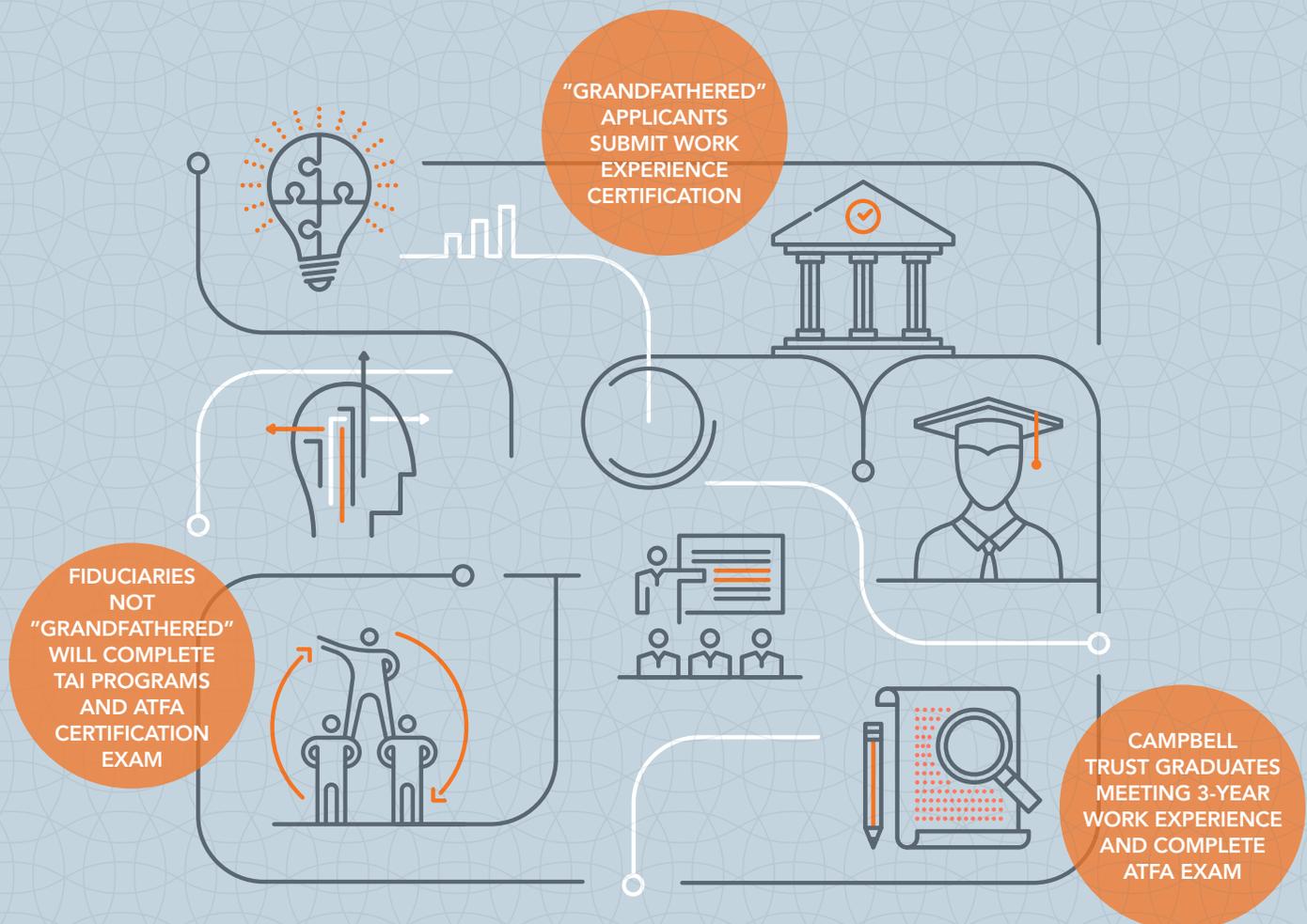
How to Apply and Begin the Process

All interested applicants are encouraged to apply and pay online at www.trustededucationfoundation.com.

Individuals requesting to be “grandfathered” should submit their manager’s certification that they meet the work experience described above. Applicants requesting “grandfathered” status will be granted ATFA Certification upon committee approval and will be notified as to their renewal/CE rotation.

Applicants who are not eligible to “grandfather” should consider enrolling in the Trust Advisors Institute to be held on the Campbell campus in June. The Fiduciary Fundamentals and Advanced programs are offered back-to-back with the ATFA Examinations begin administered the last day, requiring applicants to only miss one week in their offices. After successful completion of the Fiduciary Fundamentals Program, the Advanced Program and the ATFA Certification Examination, applicants will be granted the ATFA Certification. They will then be notified as to their renewal/CE rotation.

Graduates of Campbell’s Trust and Wealth Management degree programs who are not eligible to “grandfather” will be granted the ATFA certification upon successfully completing the ATFA Examination and their having met the three year work experience requirement detailed at left. They will then be notified as to their renewal/CE rotation.



Ongoing Continuing Education Requirements

Holders of the ATFA Certification must complete forty-five hours of approved CE (for calculation purposes one hour equals sixty minutes) every three years in order to maintain their certification. They are required to take a minimum of six hours of the forty-five in each of the following core disciplines...

- ▶ **FIDUCIARY AND TRUST ACTIVITIES**
- ▶ **FINANCIAL PLANNING**
- ▶ **TAX LAW AND PLANNING**
- ▶ **INVESTMENT MANAGEMENT**

Attending the Trust Advisors Forum at Pinehurst every year will meet all ATFA CE requirements. The holder of the ATFA does not even need to submit the ATFA CE Form so long as they provide their ATFA Certification Number upon registration for the Trust Advisors Forum each year.

For CE programs attended OTHER THAN the Trust Advisors Forum, proof of attendance and any documentation may be submitted as attended or as a single submission to Campbell University (along with the ATFA CE Form) within the three-year period. It is required that the holder of the ATFA's manager certify as to the total number of hours and the number of hours in each of the core disciplines.

Failure to meet the ATFA CE requirements will result in loss of the certification and the need to resubmit as well to pay an additional application fee and any annual renewal fees for the lapsed period in order to be recertified for ATFA purposes.

Costs of Certification and Maintenance

The ATFA Certification is designed to be affordable. The cost of ATFA certification and maintenance is as follows:

- ATFA Application Fee \$100
- ATFA Examination Fee \$100
- ATFA Annual Renewal Fee \$100

For ATFA applicants not eligible to "grandfather" the costs are as follows:

- Trust Advisors Institute—Fiduciary Fundamentals....\$1,695
(The cost includes the program, materials, housing and all meals)
- Trust Advisors Institute—Advanced Practices\$900
(The cost includes the program, materials, the ATFA application and examination fees, housing and all meals)
- BOTH the Trust Advisors Institute—Fiduciary Fundamentals
And Advanced Practices\$2,495



*The nation's
leading provider
of trust education
for over 50 years.*



Why should you acquire ATFA Certification?



CAREER ADVANCEMENT

Set yourself apart with a gold standard of professional expertise in the trust industry. Learn more about the value of the ATFA certification to you and your institution.



A CERTIFICATION PROGRAM SPECIFICALLY GEARED TO MEET THE NEEDS OF TODAY'S FIDUCIARIES

The primary focus of the ATFA certification is proudly and unwaveringly on the fiduciary side of the business...with all of its challenges and opportunities.



CONTINUING EDUCATION DEVELOPMENT

The ongoing CE requirements of the ATFA certification program can easily be maintained by attending the Trust Advisors Forum at Pinehurst. The Forum is offered by the Trust Education Foundation, Inc. and is the nation's premier trust conference. Information about the Forum can be found at www.trusteducationfoundation.com.



AFFORDABLE INVESTMENT IN YOUR FUTURE AND THE FUTURE OF THE INDUSTRY

The intentionally modest fees are not only affordable, but you will also be making an important investment in the future of the industry. The fees associated with ATFA will flow into trust scholarships for the students majoring in trust at Campbell.