TRUST AND WEALTH

CAMPBELL TRUST & WEALTH MANAGEMENT

CAMPBELL UNIVERSITY

Lundy-Fetterman School of Business

WELCOME

TRUST AND WEALTH MANAGEMENT

WELCOME TO AN EXPLORATION OF ONE OF THE MOST UNIQUE UNDERGRADUATE PROGRAMS AT CAMPBELL UNIVERSITY.

In fact, Campbell's Trust and Wealth Management Program is the nation's first, and still the only, undergraduate degree program of its kind in the United States. Part of the Lundy-Fetterman School of Business, the Program prepares graduates to serve the financial needs of high-net-worth individuals by managing their assets and by developing and implementing sophisticated tax, financial and estate planning strategies.

What is Trust and Wealth about?

While students might initially have a vague notion that Trust has something to do with banking they quickly realize it is about being a steward to others in the truest and best sense. In many instances they are called on to help with important life events. Trust professionals often become "a family member" to their clients.

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PROTECTING AND GROWING FAMILY
WEALTH FOR FUTURE GENERATIONS

What does the future hold for a career in Trust?

While the Program has produced high paying jobs for many years, the future for graduates of the Trust Program has never been brighter. Over the next 20 years, the largest transfer of wealth in American history will occur as Baby Boomers pass their assets to the next generation.

On the surface it may appear that the focus of a Trust professional is solely managing assets. Graduates quickly realize the focus of their work is to help people in some of their most critical times of need. During the advisement process, a Trust professional naturally develops a personal relationship with families and individuals.

Graduates of our Program are recognized nationwide for their people skills, hands-on experience gained from internships, work ethic and technical expertise, and are prepared to take their place as leaders in the financial services industry. The world's largest banks actively seek to employ Campbell Trust and Wealth Management graduates and interns.

COME BE A PART OF THIS EXCITING AND REWARDING PROFESSION.

MESSAGE FROM THE DIRECTOR

OVER 95% of the TWM graduates are placed in full time jobs within one month of graduation provided they are willing to relocate.

"I invite you to pursue an exciting career in Trust and Wealth Management. The Trust Program is demanding, yet very rewarding."

Over 2,000 alumni are now working with many of the nation's premier financial institutions, including: **Bank of America**, **Wells Fargo**, **J.P. Morgan Chase**, **Northern Trust Company**, **Truist**, **BNY Mellon**, **City National** and **First Citizens Bank**. Successful graduates can be found in nearly every major city in the United States.

There is a tremendous demand nationwide for our graduates. Over 95% are placed within one month of graduation with institutions throughout the U.S.

Trust is a very rewarding profession, both financially and emotionally. The job satisfaction of graduates of the Trust and Wealth Management Program is extremely high. Our graduates are proud of their profession and excited when they have the opportunity to assist families in need of their expertise.

Many of the students in the Campbell University Trust and Wealth Management Program came to Buies Creek planning to do something other than manage other people's money. Once we explain the nature of the industry, the nature of the profession and the structure of the Trust Program, students quickly change their minds and their major.

What makes students majoring in Trust and Wealth Management at Campbell University appealing to the largest financial institutions in the country?

They demonstrate:

- A strong work ethic
- A willingness to accept the challenge of a demanding major and faculty
- A strong sense of what is right and a passion to always do what is right
- The maturity to consider a career with unlimited potential for growth
- The ability to work effectively as a member of a team
- A passion for helping others
- The enthusiasm to learn and grow with the profession and not feel entitled to advance before they are ready

I challenge you to apply for admission to the Campbell University Trust and Wealth Management Program and join the "Campbell Trust Family" today.

Jimmy Witherspoon, Director
Trust and Wealth Management Degree Program
Campbell University
Graduate, Trust Program, Class of 1980
phone 910.893.1387 | witherspoon@campbell.edu

TRUST AND WEALTH DEGREE

What can I do with a degree in Trust and Wealth Management?

A degree in Trust and Wealth Management can lead to a wide variety of professions. Here are just a few examples:

TRUST OFFICER:

typically serves as a member of first line management and is considered a senior professional within the organization. As such, the Trust Officer provides team or technical supervision. The organization will depend on this person's expertise and experience with complex technical activities. The primary responsibilities of the Trust Officer are customized and sophisticated banking, investment management, liquidity and credit management, tax planning, financial planning and estate planning for the affluent clients of the institution

INVESTMENT MANAGER:

guides asset management of various securities (stock, bonds and other securities) and other assets (e.g., real estate) in order to meet specified investment goals for the benefit of the investors. Investors may be institutions (insurance companies, pension funds, corporations, charities, educational establishments etc.) or private investors (both directly via investment contracts and more commonly via pooled investment vehicles, such as mutual funds or exchange traded funds.)

FINANCIAL PLANNER:

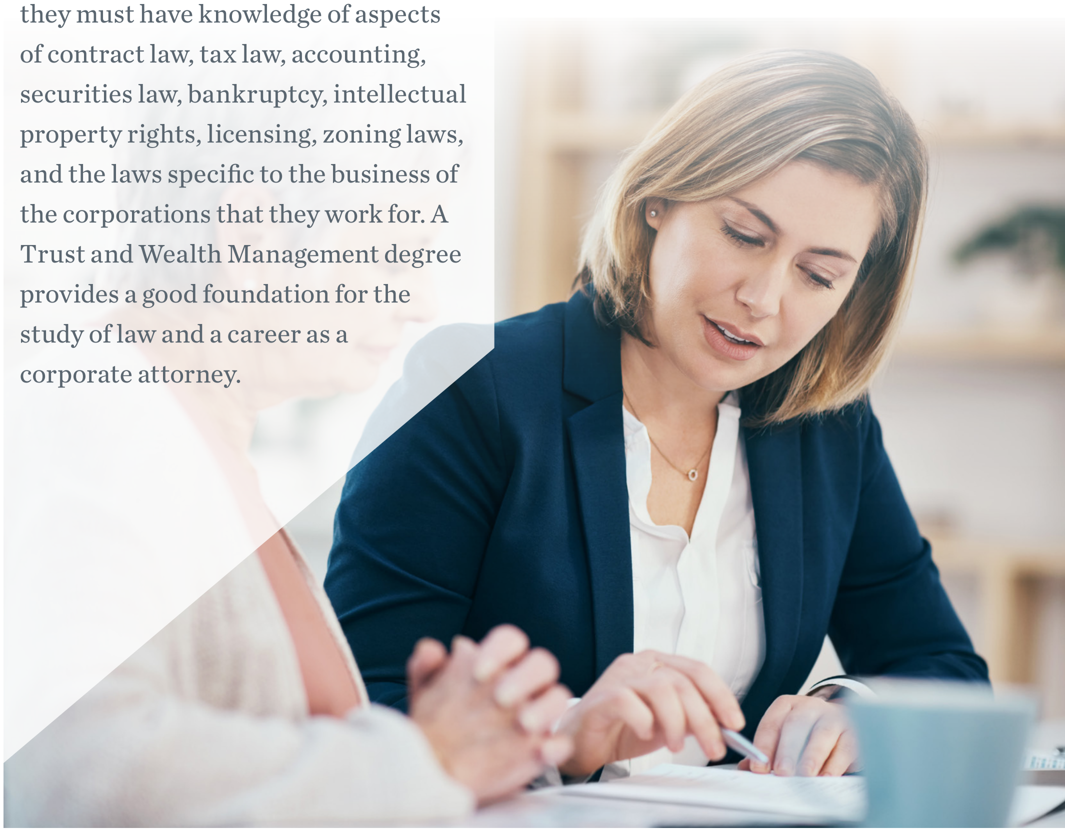
is a professional who prepares financial plans for clients. These financial plans often cover cash flow management, retirement planning, investment planning, financial risk management, insurance planning, tax planning, estate planning and business succession planning (for business owners).

CORPORATE ATTORNEY:

ensures the legality of commercial transactions by advising corporations on their legal rights and duties, including the duties and responsibilities of corporate officers. In order to do this, they must have knowledge of aspects of contract law, tax law, accounting, securities law, bankruptcy, intellectual property rights, licensing, zoning laws, and the laws specific to the business of the corporations that they work for. A Trust and Wealth Management degree provides a good foundation for the study of law and a career as a corporate attorney.

ESTATE PLANNER OR TAX ATTORNEY:

anticipates and arranges for the disposal of an estate during a person's life. Estate planning typically maximizes the value of the estate by minimizing taxes and other expenses. However, the ultimate goal of estate planning is determined by the specific goals of the client and may be as simple or complex as the client's needs dictate. In order to do this they must have knowledge of tax law, trust law and the administration of trusts and estates. A Trust and Wealth Management degree provides a good foundation for the study of law and a career as a tax or estate planning attorney.



TRUST FELLOWS PROGRAM

The Campbell School of Business has launched the presigious Trust Fellows program. Membership is by invitation only, and Trust Fellows will enjoy these additional benefits:

What You'll Experience as a Fellow

Over your next four years you will be involved in:

- The first-year dinner and networking event at Angus Barn in Raleigh
- Regularly scheduled on-campus seminars the first year with trust alumni and senior trust executives
- Participating in the Trust Advisors Forum in Pinehurst Resort as both a junior and senior
- Networking trips to leading financial institutions and cities
- Waiver of the GMAT/GRE requirement upon application for admission to Campbell's 4/1 BBA/MBA Program upon completion of your junior year
- An Alumni Mentor working in the industry to turn to for guidance
- Since Trust Fellows are above all encouraged to be good stewards, leaders and elevate others, there will of course be community service projects.

Build leadership skills. Develop life-long friendships.

RYAN NEWKIRK (CLASS OF 2001)
SHARING HIS INSIGHTS WITH THE TRUST FELLOWS

BECOMING A CERTIFIED TRUST PROFESSIONAL

Campbell Trust Program graduates are eligible to take the examination for the nation's leading Trust professional certifications.

CERTIFIED FINANCIAL PLANNER™ CERTIFICATION (CFP®)[1]

Campbell University has the distinction of being registered with the Certified Financial Planner Board of Standards, Inc. Graduates of the Trust and Wealth Management Program are eligible to sit for the national CFP® Certification Examinations and earn this most prestigious of all certifications.

1 [Certified Financial Planner Board of Standards, Inc. owns the marks CFP®, CERTIFIED FINANCIAL PLANNER™, and federally registered CFP (with flame logo) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.]

CERTIFIED TRUST AND FIDUCIARY ADVISOR (CTFA)

Graduates of the Campbell Trust Program may also choose to pursue the prestigious CTFA designation at some point in their career. The American Bankers Association offers the Certified Trust and Financial Advisor (CTFA) designation to Trust professionals meeting certain experience and education requirements. Trust officers wishing to receive the CTFA designation must pass a relevant examination. Students graduating from the Trust Program are eligible to sit for the CTFA examination upon completion of the work experience requirement.

ATFA CERTIFICATION

CAMPBELL UNIVERSITY is proud to offer the ATFA Certification to fiduciaries and to the financial services industry. Trust professionals nationwide 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.

To find out more about Campbell's Accredited Trust and Fiduciary Advisor certification visit **trusteducationfoundation.com**.

"So many of the relationships I have built in my career are primarily as a result of the Campbell Trust Program. Not only has my trust education prepared me for the opportunities ahead, but the ongoing network of current and former Campbell graduates also continues to influence my career. I will forever be grateful and honored to be a part of the "Campbell Trust Family."

PHILLIP STRICKLAND
SENIOR VICE PRESIDENT
SENIOR DIRECTOR OF INSTITUTIONAL TRUST
FIRST CITIZENS BANK
CAMPBELL ALUMNUS & ADJUNCT PROFESSOR
4/1 MBA GRAD CAMPBELL, CLASS OF 2006

PROGRAM OPTIONS

Typically over **half** of the trust majors choose to complete the 4/1 BBA/MBA degree program, receiving both their undergraduate degree and an MBA in a total of five years.

There are three program options for Trust undergraduates:

1. TRUST AND WEALTH MANAGEMENT CURRICULUM

In addition to the basic freshman and sophomore general education courses, all students are required to complete the 15 core Trust courses. Students graduate with a BBA. Often combined with the opportunity to participate in paid summer internships, graduates of the Trust Program are ready to contribute to employers immediately after graduation.

2. TRUST PRE-LAW

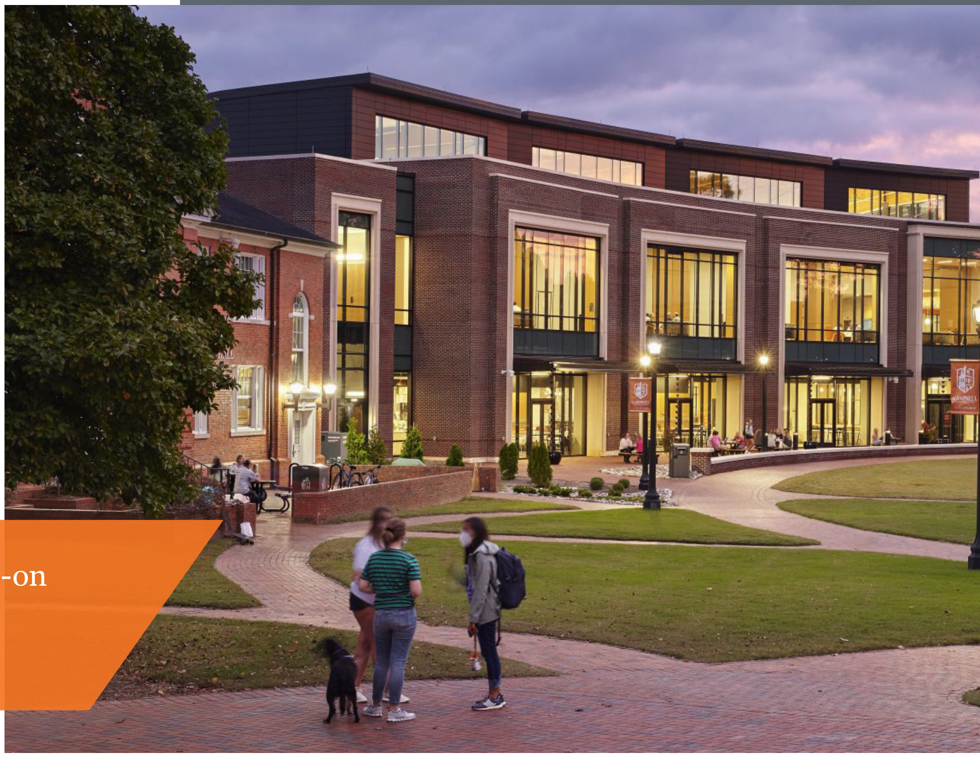
The Trust Pre-Law major better prepares students for the rigors of law school and develops some of the most outstanding attorneys in the country. The majority of the Trust faculty are attorneys and are well-versed in the academic rigors of law school. Classes are taught using the same teaching methods those students will later experience in law school, increasing the level of success for graduates in their legal studies.

Almost all Trust Pre-Law graduates are admitted to law school. Our alumni have graduated from law school at Campbell, Wake Forest, Duke, North Carolina, Florida, Yale and Virginia. Students enter already familiar with the subject matter they will study in law school. This includes property law, contract law, partnership law, corporate law, trust law, tax planning (income tax, state tax, gift tax, generation-skipping and fiduciary income tax), employee benefit planning, insurance planning, estate planning, and trust and estate administration.

3. BBA/MBA 4/1 PROGRAM

The third program option is a 4/1 BBA/MBA (Bachelor of Business Administration and a Master of Business Administration) Degree Program. Students take a combination of undergraduate Trust and graduate MBA courses in this program during their final two years at Campbell to earn the dual degrees. Students apply to the MBA program at the end of their junior year. Well over half of Trust students complete the 4/1 program. By enrolling in the 4/1 program the student will receive both degrees in a total of five years rather than six. Choosing to pursue the 4/1 program also allows the student to participate in a second paid summer internship, making them even more productive on the job from day one.

Within our **50+** year program we've had over **2,000** graduates with a **95%** placement rate and **ALMOST ALL** graduates who have applied to law school were accepted!



Our curriculum incorporates hands-on experience with the latest tools and software used within the industry.

COURSES

Trust Pre-Law is a great major for those interested in the areas of estate planning, tax planning, business planning or in a career as a corporate attorney.

REQUIRED TRUST COURSES

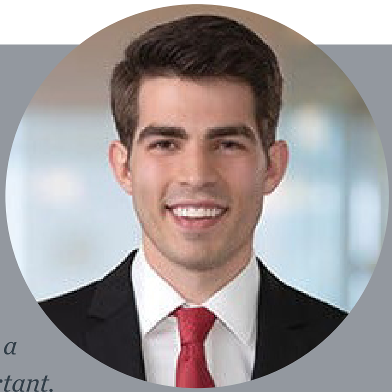
TRST 412	WILLS, ESTATES, AND TRUST
TRST 413	FINANCIAL PLANNING PRACTICES FOR FIDUCIARIES
TRST 421	FIDUCIARY LAW I
TRST 422	ESTATE TAXATION
TRST 431	GIFT AND FIDUCIARY TAXATION
TRST 441	OPERATIONAL FUNCTIONS OF A TRUST DEPARTMENT
TRST 430	FIDUCIARY LAW II
TRST 433	INSURANCE
TRST 435	REAL ESTATE
TRST 450	ESTATE PLANNING SEMINAR
TRST 442	TRUST AND ESTATE ADMINISTRATION
TRST 436	EMPLOYEE BENEFITS
TRST 439	INVESTMENTS AND SECURITY ANALYSIS
TRST 443	INVESTMENTS AND PORTFOLIO MANAGEMENT
TRST 444	TRUST SALES AND MARKETING

TRUST PRE-LAW ELECTIVE COURSES

ENGL 302	ADVANCED WRITING (PRE-LAW)
POLY 229	THE NATIONAL GOVERNMENT (PRE-LAW)
POLY 300	INTRODUCTION TO LAW (PRE-LAW)
PHIL 121	INTRODUCTION TO LOGIC (PRE-LAW)
THEA 115	PUBLIC SPEAKING (PRE-LAW)

REQUIRED MBA COURSES FOR THE 4/1 PROGRAM

MBA 710	ACCOUNTING FOR DECISION MAKING
MBA 720	APPLIED ECONOMICS FOR BUSINESS LEADERS
MBA 730	FINANCE AND CAPITAL MANAGEMENT
MBA 740	COMMUNICATION & CRITICAL THINKING FOR ETHICAL DECISION MAKING
MBA 750	ORGANIZATIONAL CULTURE IN A CHANGING ENVIRONMENT
MBA 760	BUSINESS ANALYTICS
MBA 770	DIGITAL AND CONTEMPORARY MARKETING STRATEGIES
MBA 780	GLOBAL SUPPLY CHAIN MANAGEMENT
MBA 790	STRATEGIC MANAGEMENT "LIVE CASE" SEMINAR



"The Trust Program was instrumental in developing a generational perspective and sense of duty to my clients as an attorney. The notion of "Leaving a Legacy" is paramount and demands a comprehensive approach to estate planning that extends beyond mere tax mitigation. A legacy is measured in the eye of the beholder – whether a large monetary fortune, a small family business, or a charitable purpose, each client's legacy is equally important. Campbell's Trust Program prepares students to identify clients' objectives and maneuver through the unexpected challenges and complex family dynamics that often threaten to derail legacies from enduring through generations."

JESSE HUBERS, CPA JD LLM
SENIOR MANAGER, TAX ADVISORY GROUP
HILL, BARTH, & KING, CPAS & CONSULTANTS
CLASS OF 2016

MEET THE ALUMNI

The 2,000+ alumni of the Trust Program can be found nationwide in all major financial institutions. For more than 50 years, Campbell University Trust and Wealth Management Program has prepared more trust professionals and placed them in more financial institutions than any other program in the nation.

YOU WILL QUICKLY DISCOVER THAT THE TRUST ALUMNI ARE A FAMILY, AND YOU CAN COUNT ON THEIR HELP WHEN YOU NEED IT.

They may be in Boston, Dallas, Atlanta, Raleigh, Chicago or Los Angeles; they may have graduated 50 years ago or last year. However, what they have in common is a sense of appreciation, of pride and of loyalty to Campbell University and to the Trust Program.

The alumni are our greatest resource in ensuring that today's students will have even better job opportunities going forward. Many serve loyally on the Board of Directors of the Trust Education Foundation, Inc. Others support the excellent intern program. All our graduates are proud to call themselves members of the "Campbell Trust Family."

"Campbell's Trust Program provided me with a unique opportunity to gain comprehensive and in-depth knowledge about the trust and wealth management industry. Not only has that education opened the door for an incredibly rewarding career, it has afforded me the opportunity to serve and care for clients through some of the most challenging periods of their lives. I am truly grateful to have been a part of this one-of-a-kind program."

SARAH W. HANCOCK
SENIOR VICE PRESIDENT
FIDUCIARY STRATEGIST TEAM DIRECTOR
FIDUCIARY AND INVESTMENT RELATIONSHIP MANAGEMENT
TRUIST
MTWM GRAD CAMPBELL
CLASS OF 2010

"I chose the Trust and Wealth Management field because I enjoy helping people and this is a people business. It is about helping families determine how they will pass their wealth on to succeeding generations."

BRADLEY KELLY
FINANCIAL ANALYST
CLIENT STRATEGIST
BNY MELLON WEALTH MANAGEMENT
4/1 MBA GRAD CAMPBELL
CLASS OF 2014

"Campbell University's Trust Program teaches the value of relationships, the meaning of true stewardship and the high level of responsibility that goes along with managing money for multiple generations. I learned how rewarding and meaningful it is to always put others' interests ahead of my own. That lesson in humility has taught me the right way to treat clients, beneficiaries and associates. The Trust Program is the perfect fit for anyone that strives to make a difference in the lives of others."

RYAN A. NEWKIRK
PRINCIPAL
GRANVILLE CAPITAL, INC.
4/1 MBA GRAD CAMPBELL
CLASS OF 2001
2008 YOUNG DISTINGUISHED ALUMNUS AWARD RECIPIENT

"Campbell's Trust Program helped me find the direction I was seeking in my career by providing me with endless opportunities to network and experience different avenues within Wealth Management. This has surely jumpstarted my career but even more importantly, allowed me to be surrounded by truly genuine and good people that care about the interests of others above themselves. There is not a program in this country that provides the depth of knowledge and career resources that Campbell's Trust Program does."

KEVIN M. MILLS
WEALTH PARAPLANNER
FIRST CITIZENS WEALTH MANAGEMENT
CLASS OF 2023

Graduates of the Trust and Wealth Management Program are proud of Campbell's Business School's national reputation.

A PROUD HERITAGE FOR OVER 50 YEARS

INDUSTRY SUPPORT

Our program and students benefit enormously from the financial support and influence of our alumni and friends in the trust industry. Their influence has led to the funding of scholarships for trust students by **Wells Fargo** and by **Bank of America**.

This influence has also led to major financial commitments including those made by our friends at **Truist**, **Fidelity Bank** and **First Citizens Bank**. Most recently, due to the generosity of **First Citizens Bank**, that of several of our alumni and that of several of our friends, we have launched the **First Citizens Bank Wealth Management Center**. The Center benefits all the students in the Lundy-Fetterman School of Business, but in particular those majoring in Trust and Wealth Management.

Our students train on the latest and most sophisticated technology systems which make them more marketable to financial institutions. In many cases, our students will train on the same systems they will use on the job making them even more marketable.

THE FIRST CITIZENS BANK WEALTH CENTER— A TREMENDOUS RESOURCE FOR TRUST MAJORS

INTERNSHIPS

All students majoring in Trust and Wealth Management have the opportunity to earn at least one paid summer internship. Students enrolled in the 4/1 BBA/MBA program have the opportunity to earn two paid summer internships with financial institutions such as: **Bank of America**, **Wells Fargo**, **Merrill Lynch**, **JP Morgan Chase**, **Truist**, **BNY Mellon**, **City National** and **First Citizens Bank**. In a typical summer, there are 50+ students working in cities such as New York, Chicago, Dallas, Los Angeles, Atlanta, San Francisco, Austin, Boston, Winston-Salem, Charlotte and Raleigh.

The internships are both challenging and rewarding. Interns are mentored by a senior manager, thus students have the opportunity to learn from the best in the industry. Real hands-on experience, coupled with compensation and the privilege of working for the nation's premier financial institutions are amazingly rare opportunities for students in today's world. Many interns are offered permanent jobs where they interned upon graduation from Campbell.

WHAT IS THE KEY TO BEING OFFERED AN INTERNSHIP?

Employers look for students with a strong work ethic, maturity, strong communication skills, a passion for doing the right thing and the ability to work as an effective member of a team. At the start of their careers, it is essential for students to be open to the idea of relocating to where the opportunities are.

The Trust Internship Program affords students the rare opportunity to spend their summers in exciting cities across the country working with and shadowing experienced senior managers.

Often students fall in love with and ultimately choose to accept permanent hire positions in the cities where they interned.

"My internship at Bank of America in Fort Lauderdale, FL gave me the first insight into what it would be like to work for a bank, for a large corporation and see how all the duties were divided among different job titles. The internships not only give you an idea of what it is going to be like, but they also push you out of your comfort zone."

ASHLEY POTTER
VICE PRESIDENT WEALTH MANAGEMENT,
MANAGER OF INSTITUTIONAL BUSINESS SUPPORT
FIRST CITIZENS BANK
4/1 MBA GRAD CAMPBELL
CLASS 2010

PLACEMENT

As a Campbell Trust Major, you are exposed to a unique career preparatory experience. You will learn the skill sets necessary to be productive on day one. The Trust Program is distinguished by a focused determination on our part to give you every opportunity to be employed upon graduation from Campbell University.

WHERE DOES IT BEGIN, AND WHAT IS THE PROCESS?

Our placement process actually begins in the Fall Semester of your junior year. As a Campbell Trust Major, the placement process begins with a Resume Writing / Interview Skills Workshop. Members of the Board of Directors of the Trust Education Foundation, Inc., are on campus for an afternoon session designed to prepare the juniors for the interview process. These seasoned professionals have literally hired hundreds, if not thousands, of people over their respective careers. Their insights and guidance are invaluable.

Students meet with the Director of Placement and Career Services for the Business School to set up placement files and submit their resumes for distribution. The Director is the primary point of contact during the interview process and is a great advocate for the students.

Students submit their biographies and pictures for the online placement bulletin. The bulletin can be viewed from the Campbell University website but also from the website of the Trust Education Foundation, Inc., at **trusteducationfoundation.com**.

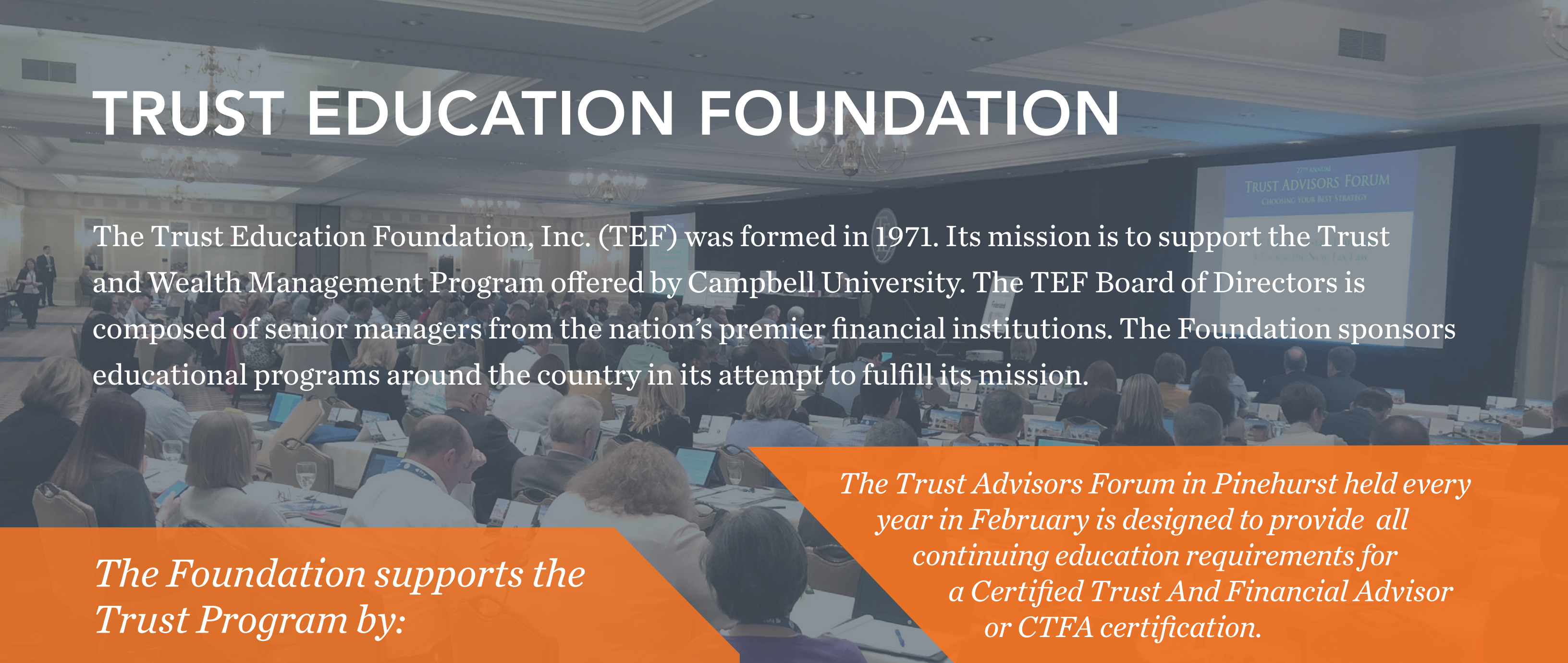
INTERNSHIP PLACEMENTS

Interviews for 10-week paid summer internships are held on campus with the vast majority of qualified students receiving offers. The internships are with institutions including **Bank of America**, **Wells Fargo**, **JP Morgan Chase**, **Truist**, **BNY Mellon**, and **First Citizens Bank** in cities such as:

RALEIGH	WINSTON SALEM	BOSTON
CHICAGO	DALLAS	PHILADELPHIA
CHARLOTTE	NEW YORK	SAN FRANCISCO
LOS ANGELES	ATLANTA	SEATTLE

Students choosing to enroll in Campbell's 4/1 BBA/MBA Program have the opportunity to earn a second internship with the same or a different institution. The overwhelming majority of students completing one or two internships are offered a permanent position during their final year at Campbell, many with permanent hire offer even before the beginning of their final year.

As interns, students receive real world, hands-on experience working with the best professionals in the business. Also, when you think about it, an internship is actually a 10-week interview. Throughout the internship, employers will be able to see the technical expertise, work ethic, level of maturity, communication skills and the ability of the student to work as a member of a team of professionals. Our students shine in those areas. Well over 95% of Trust students are placed within one month of graduation, showing that employers appreciate the value of the Campbell Trust education.



TRUST EDUCATION FOUNDATION

The Trust Education Foundation, Inc. (TEF) was formed in 1971. Its mission is to support the Trust and Wealth Management Program offered by Campbell University. The TEF Board of Directors is composed of senior managers from the nation's premier financial institutions. The Foundation sponsors educational programs around the country in its attempt to fulfill its mission.

The Foundation supports the Trust Program by:

- **Providing curriculum oversight ensuring students are exposed to cutting edge instruction in the areas of fiduciary law, tax planning, financial planning, investment management, estate planning and in trust and estate administration.**
- **Providing scholarship aid for worthy deserving students enrolled in the Trust Program. Over 25 scholarships have been fully funded due to the efforts of the Foundation.**
- **Spreading the word about the Campbell University Trust Program by increasing the visibility of the program among financial institutions nationwide and enhancing the placement opportunities available to the graduates.**

The Trust Education Foundation's website is a tremendous resource for the industry and affords our graduates and excellent opportunity to network. The Foundation website contains information about:

- The Trust Program
- An online placement bulletin (featuring intern candidates and permanent hire candidates)
- An opportunity for the trust alumni to network using Linkedin

To find out more about Campbell's Trust Advisors Institute, visit **trusteducationfoundation.com**.

The Trust Advisors Forum in Pinehurst held every year in February is designed to provide all continuing education requirements for a Certified Trust And Financial Advisor or CTFA certification.

The flagship program offered by the Foundation is the **TRUST ADVISORS FORUM (TAF)** at Pinehurst. In a typical year approximately 340 senior trust officers from 38 states representing 110 institutions will attend the four-day educational program. The Forum is the nation's foremost conference for trust professionals. More importantly, the leading institutions from across the country actively recruit on campus each year.

TRUST ADVISORS INSTITUTE (TAI) is sponsored by Campbell University and is an exceptional educational opportunity—whether you're a seasoned veteran looking to "brush up" on current practices and policies, or a newcomer seeking a comprehensive overview of the issues in your field.

As its name suggests, TAI originated as a program for bank trust officers, and it retains a strong focus on the fiduciary side of the trust and wealth management industry. It also offers value to managers and other employees of investment firms, trust companies, credit unions, RIA's, accounting and law firms, retirement plan providers, supervisory agencies and non-profit administrators.

TRUST EDUCATION Foundation

PROGRAM HIGHLIGHTS

NATIONWIDE RECOGNITION

Our graduates are consistently recognized for having the hands-on training, people skills, and technical expertise needed to be leaders in the financial services industry.

CFP® CERTIFICATION WITHIN REACH

Graduates are eligible to pursue the CFP® (Certified Financial Planner) certification by sitting for the CFP Exam.

EXTENSIVE INDUSTRY CONNECTIONS

Our program boasts an extensive network of alumni and supporters, as well as an active Board of Directors from the Trust Education Foundation Inc. These bodies support job placement for our graduates aiding in a 95% job placement rate.

POTENTIAL TO PURSUE THE CTFA DESIGNATION

Once graduates meet the work experience requirements determined by the American Bankers Association, they have the potential to pursue CTFA (Certified Trust and Financial Adviser) designation.

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TRUST EDUCATION Foundation

For more information about Trust as a career, please contact:

JIMMY WITHERSPOON
Director, Trust and Wealth Management Degree Program
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For information about the Lundy-Fetterman School of Business, visit campbell.edu/business.

For more information about Campbell University Admissions, visit campbell.edu/admissions or call 800.334.4111.

LEARN MORE APPLY NOW