CAMPBELL UNIVERSITY

Graduate Programs
Lundy-Fetterman School of Business

MTWM

MASTER OF TRUST AND WEALTH MANAGEMENT

Raleigh Campus and 100% Online Options

LUNDY-FETTERMAN SCHOOL OF BUSINESS

MASTER OF TRUST AND WEALTH MANAGEMENT

MTWM

Welcome to an exploration of one of the most unique graduate programs at Campbell University. In fact, Campbell's Master of Trust and Wealth Management Program (MTWM) is the nation's only 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.

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Protecting and growing family wealth for future generations.

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.

Come be a part of this exciting and rewarding profession.

I invite you to pursue an exciting career in Trust and Wealth Management. The 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, Truist, City National Bank/RBC 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 United States.

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

Prospective students might have a vague notion that Trust has something to do with banking, but 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.

What makes graduate students in the Master of Trust and Wealth Management Program at Campbell University appealing to the largest financial institutions in the country? They demonstrate:

- **a strong work ethic**
- **a deep commitment to high ethical standards**
- **a specialized skill set in a growing profession**
- **the ability to work effectively as a member of a team**
- **a passion for helping others as a true fiduciary**

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

Tyler Britton, Director
britton@campbell.edu
919-518-4308

TRUST AND WEALTH MANAGEMENT PROFESSIONS

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

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

A TRUST OFFICER is considered a senior professional within the organization, providing team or technical supervision. The organization depends on this person throughout complex technical activities. Responsibilities include customized and sophisticated banking, investment, liquidity and credit management, tax, financial and estate planning for the affluent clients of the institution.

A FINANCIAL PLANNER prepares financial plans for clients. These plans often cover cash flow management, retirement planning, investment planning, financial risk management, insurance planning, tax planning, estate planning and business succession planning.

AN 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 is determined by the specific goals of the client. A knowledge of tax law, trust law and the administration of trusts and estates is essential.

AN 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 or private investors.

TRUST CERTIFICATIONS

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

"As a founding partner in a law firm that devotes itself to the practice of trusts and estates, I cannot fathom a degree program that would prepare one better for dealing with complex wealth and fiduciary matters—or law school in general, for that matter—than Campbell University's Trust and Wealth Management Program. We often see the term "fiduciary duty" used in a casual manner in the world today, but graduates of the program have a visceral understanding of that legal concept upon graduation. That is unique."

KRISTY MEARES SIDES, JD, MBA
Partner
Worrell Sides LLP
Class of 2001

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 MTWM program are eligible to sit for the national CFP® Certification Examinations and earn this most prestigious of all certifications.

CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)

Graduates of the MTWM 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.

ACCREDITED TRUST AND FINANCIAL ADVISOR (ATFA)

ATFA Certification is now proudly offered by Campbell University. Over 1,000 professionals nationwide now hold ATFA certification the focus of which is on the fiduciary side of the business. 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.

[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.]

ADMISSIONS

ADMISSION QUALIFICATIONS

1. A bachelor's degree from an accredited institution of higher education.
2. A minimum grade point average of 2.8 on a 4.0 point scale on all undergraduate work.
3. Applicants with a 3.0 GPA or higher are not required to take the GRE/GMAT/LSAT.
4. Applicants with less than a 3.0 GPA (meeting certain work experience and education requirements) may be considered for a GRE/GMAT/LSAT waiver. The waiver request form can be found on the MTWM website.
5. Demonstration of undergraduate-level competencies in the following areas:
   a. Accounting b. Business Law c. Economics d. Corporate Finance

   This requirement may be satisfied in a variety of ways. Please see the MTWM website for more details.

Applicants with GPA or test scores below the preferred criteria may still be considered on a case-by-case basis.

APPLICATION PROCESS

1. Complete the online application.
2. Attach a current resume to your application.
3. Attach an application essay.
4. Submit official copies of transcripts from all universities attended via online application.
5. Submit one (1) professional letter of recommendation via online application (optional).
6. Take the GMAT, GRE, or LSAT if your cumulative GPA is BELOW 3.0 and your application for a waiver (if one was submitted) has been denied. Have the score report sent to the School of Business Graduate Programs Office.
7. Select EITHER the "Online" or "Raleigh" program option.

For more information or to apply, visit us at **campbell.edu/business**.

CURRICULUM

- **TRUST 620** Financial Planning Seminar
- **TRUST 630** Investment Analysis
- **TRUST 631** Advanced Investment Analysis
- **TRUST 633** Advanced Income Taxation
- **TRUST 710** Application of Fiduciary Principles
- **TRUST 720** Estate Taxation Seminar
- **TRUST 730** Gift and Fiduciary Income Taxation Seminar
- **TRUST 740** Risk Management Applications
- **TRUST 745** Wealth Management Sales
- **TRUST 750** Advanced Retirement Planning
- **TRUST 760** Advanced Estate Planning Seminar
- **TRUST 770** Advanced Wealth Transfer Seminar
- **TRUST 780** Legal/Regulatory Issues

The MTWM Program is set on either a one-year or two-year track. Online and In-Person students must decide on a track before beginning the program.

COURSE DESCRIPTIONS

TRUST 620

Financial Planning Seminar

An integrative analysis of the financial planning process, including risk and investment management, as well as tax, retirement, and estate planning. Special focus on cutting-edge planning techniques for individuals, culminating in a detailed research project.

TRUST 630

Investment Analysis

A study of security analysis, with an emphasis on fundamental analysis of equities and bonds. Specific topics include market efficiency and anomalies, security valuation, asset pricing models, equity and bond fundamentals, and the use of futures and options markets. Team project involving the analysis of an actual common stock is required.

TRUST 631

Advanced Investment Analysis

A study of portfolio management, with an emphasis on customizing asset allocation strategies and tactics for individual and institutional investors. Modern Portfolio Theory is introduced and applied. Topics also include bond management strategies, portfolio performance evaluation, international diversification, and the assessment of alternative investments. Team project involving the development of an investment plan and then the management of an associated investment portfolio is required.

TRUST 633

Advanced Income Taxation

A study of the principles and rationale of the federal income tax laws and their impact on complex tax situations. There will be an emphasis on advanced strategies to minimize the impact of federal income taxes.

"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
Executive Director
Trust and Fiduciary Services/
Senior Vice President
First Citizens Bank
Class of 2006

TRUST 710
Application of Fiduciary Principles

A comprehensive study of the duties and liabilities of a trustee with special focus on current trends by the judiciary to adapt to the current environment. The remedies to those harmed by fiduciary breaches will be presented in case study format.

TRUST 720
Estate Taxation Seminar

A study of the principles and rationale of federal estate tax law as it continues to evolve in the 21st century. Emphasis on cutting-edge techniques to minimize the impact of the law, while maintaining flexibility to deal with future anticipated changes in the law.

TRUST 730
Gift and Fiduciary Income Taxation Seminar

A study of the principles and rationale of federal gift, generation-skipping, and fiduciary income tax laws and their impact on the wealth-transfer process. A focus on cutting-edge techniques to minimize the laws' impact on efficient wealth-transfer strategies will be presented in case study format.

TRUST 740
Risk Management Applications

A comprehensive analysis of the risk management process and its impact on the individual, business, and the economy in the 21st century. Case studies on current trends in risk management will be presented in class.

TRUST 745
Wealth Management Sales

A study of effective sales strategies in the current Wealth Management environment. The interdisciplinary approach reviews current product and service offerings across the wealth management spectrum and addresses the sales techniques appropriate for each product and service. The study includes sales cycle dynamics and managing the referral network and prospect pipeline.

TRUST 750
Advanced Retirement Planning

An advanced analysis of E.R.I.S.A. and its impact on various types of retirement plan offerings. A detailed focus on current trends and employer-liability issues will be emphasized using current real-life scenarios as case studies.

TRUST 760

Advanced Estate Planning Seminar

An advanced inter-disciplinary study of the use, conservation, and efficient transfer of wealth. Areas of emphasis include the law of property, wills, trusts, insurance, and taxation. Group case problems require analysis of complex scenarios and development of an appropriate estate plan.

TRUST 770

Advanced Wealth Transfer Seminar

An advanced examination of the appropriate techniques to facilitate wealth transfer through estate and trust administration. Complex case problems examine the risks of fiduciary administration as well as techniques required to fulfill legal requirements of probate proceedings.

TRUST 780

Legal/Regulatory Issues

A comprehensive analysis of the legal and regulatory environment facing the Wealth Management industry. Compliance considerations include; Regulation 9; Sarbanes/Oxley; OFAC; the Privacy Act; and other due diligence issues. Legal and Regulatory matters include the Uniform Trust Code, the Prudent Investor Act, the Uniform Principal and Income Act and their implications for fiduciary administration.

"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.
Class of 2001

Placement Opportunities in a Booming Industry

As a Campbell MTWM student you will be exposed to a unique career preparatory experience. You will learn the skill sets necessary to be productive from day one in the financial services industry...a booming field with unlimited opportunity for growth over your career. Just as importantly, the Trust Program is distinguished by a single-minded determination on our part to give you every opportunity to be employed upon graduation.

You will find the Business School Career Services Office and the Director of the Trust Program to be invaluable resources. The University has very strong connections with institutions such as Wells Fargo, Bank of America, JP Morgan, Truist, and First Citizens nationwide. In addition, our alumni network of almost 3,000 graduates of either the undergraduate or graduate trust program is fiercely loyal to Campbell's trust program and will serve you well in the placement process. The alumni will also make trusted and wise mentors as start you launch your career and enter the industry.

"Certainly breaking into the Wealth management sector of the financial industry can be accomplished without formal training over time. However, for me, the MTWM program has propelled my career at an exponential pace. The depth of training, accreditation opportunities and networking through Campbell in my opinion is unmatched."

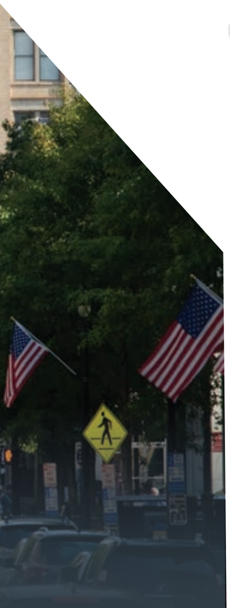
WILLIAM S. CREWS III, CTFA
Vice President
D.A Davidson Trust Company
Class of 2006

Over 95% of MTWM graduates are placed in full-time jobs within one month of graduation.

Students meet with the Director of Career Services and Professional Development 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 may submit their biographies and pictures for the online placement bulletin as well. The bulletin can be viewed from the Campbell University website, and also from the website of the Trust Education Foundation, Inc., at **trusteducationfoundation.com**.

To maximize the benefits of our placement contacts, it is critical that you be willing to relocate upon graduation. If you are open to relocation to where the opportunities are, graduating from the MTWM Program will open amazing doors to a career where you can be proud of what you do, make a very comfortable living and, most importantly, serve others as a true steward.

With a willingness to relocate, our graduates are working in cities such as:



MEET THE ALUMNI

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.

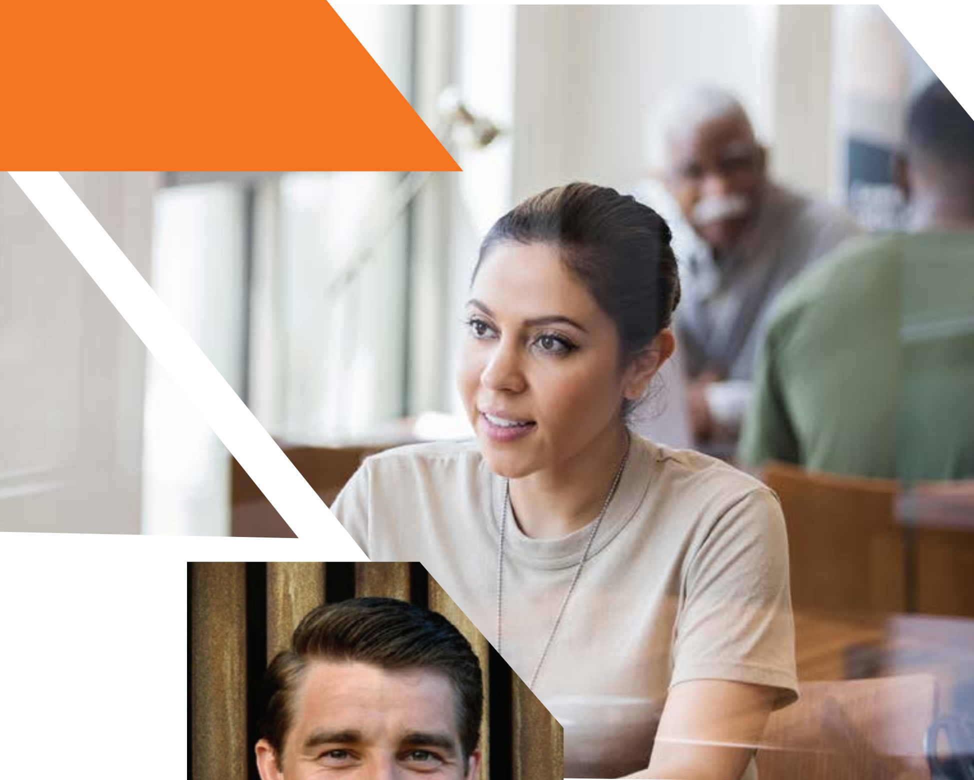
BRADLEY KELLY
Vice President, Client Strategist
BNY Wealth - New York, NY
Class of 2014

Alumni of both the undergraduate and graduate Trust Program can be found nationwide in all major financial institutions.

For over 50 years, Campbell University's 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 40 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 of our graduates are proud to call themselves members of the "Campbell Trust Family."



Campbell's Trust and Wealth Management Program is like no other. If you want to help people and make a difference in someone's life, then the Trust and Wealth Management Program is a great option for you.

JULIE CAMERON, CFP®, CTFA
Managing Director /
Senior Trust Officer
Bank of America Private Bank
Class of 2010

"Campbell's Trust Program both prepared and launched me into a career far more successful and personally rewarding than I could have ever imagined. The trust industry as a whole provides a unique opportunity to take care of individuals by helping them maximize their wealth, create a legacy, and leave a lasting impact on their families, communities and the world."

BEN T. HOPF
Co-Founder and CEO
Atticus, Inc., San Diego, CA
Class of 2011

A proud heritage for OVER 50 YEARS

Graduates of the MTWM program are proud of Campbell Business School's national reputation.

Students benefit enormously from the financial support and influence of our alumni and friends in the trust industry.

This influence has also led to major financial commitments including those made by our friends at Wells Fargo, 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 Wealth Management Center. The Center benefits all the students in the Lundy-Fetterman School of Business, but in particular those in Trust and Wealth Management.

PAUL CLARK
Principal and
Chief Compliance Officer
Mill Capital Management LLC
Class of 1986

> *"The opportunity for Campbell Trust graduates is high. Banks continue to grow not only in Trust Management and Wealth Management, but also in the total financial service industry. There are opportunities in investments, insurance, real estate, as well as in banking credit opportunities."*

TRUST EDUCATION FOUNDATION (TEF)

The Trust Education Foundation, Inc. (TEF) was formed in 1971 with a mission to support Campbell's Trust and Wealth Management Program. With a Board of Directors composed of senior managers from the nation's premier financial institutions, the Foundation supports the Trust Program by providing curriculum oversight to ensure 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. The Foundation also works to increase the visibility of the Trust Program among financial institutions nationwide to enhance the placement opportunities available to graduates.

The Trust Education Foundation offers a website which has become a tremendous resource for the industry and affords our graduates an excellent opportunity to network. The website contains:

- **An online placement bulletin featuring intern candidates and permanent hire candidates**
- **An opportunity for trust alumni to network using LinkedIn**

In addition, the Foundation sponsors educational programs around the country to help fulfill its mission. Two of the biggest educational programs offered include:

TRUST ADVISORS FORUM (TAF)

The foundation's flagship program, the Trust Advisors Forum is held at Pinehurst Resort in Pinehurst, North Carolina every February. In a typical year approximately 300 senior trust officers from 30 states, representing 110 institutions, will attend the four-day educational program. For over 30 years the Forum has been the nation's foremost conference for trust professionals.

TRUST ADVISORS INSTITUTE (TAI)

Founded in 1967, TAI originated as a program for bank trust officers and retains a strong focus on the trust industry. It also offers value to managers and other employees of investment companies, brokerages, accounting and law firms, retirement plan providers and benefits administrators.

For more information on the Trust Education Foundation Inc. visit **trusteducationfoundation.com**.

TESTIMONIALS

Campbell has a continuing education program that is provided through the Trust Advisors Forum in Pinehurst each year. This draws people from over one hundred organizations from 30 states throughout the U.S. These financial services organizations have an opportunity to interview Campbell students while we are there at the program.

KEVIN WARD
Senior Vice President/ Senior Trust Manager(Retired)
Truist Bank
Class of 1986

The Trust Program gave me the tools needed to build a successful career and the knowledge needed to be a trusted resource to my clients. While grateful for the education I received, I value the relationships I built while at Campbell as well. The connections I made have proven invaluable time and time again. The people I met helped me find a job and I continue to use the alumni network in my day to day life.

LAURA REINKE
Assistant Vice President
Institutional Advisor
First Citizens Bank
Class of 2007

The job is never the same. Each situation it is unique based on family dynamics and what is held in the estate. No client owns the same assets; therefore, we have to be knowledgeable about a broad range of investment instruments.

KIMBERLY HAMILTON
Senior Vice President/ Manager Estate Services
First Citizens Bank
Class of 2009

As an attorney, I assist clients with estate planning and counsel them on charitable gifting strategies using skills that I originally learned in the Trust and Wealth Management Program. Looking back, I know I would not be where I am today were it not for the guidance and education I received as a student in Campbell's Trust and Wealth Management Program.

CHRIS HEWITT, JD
Partner
Womble Bond Dickinson (US) LLP
Class of 2010

MEET THE FACULTY

Richard Bowser
Visiting Professor of Business
Associate Professor of Law
Norman A. Wiggins School of Law
B.A. Grove City College
MA Westminster Theological Seminary
JD Campbell University

Tyler Britton
Assistant Professor of Business
B.B.A. Campbell University
J.D. Campbell University
Campbell University

George Burnett, JD, CFP®, ATFA
Adjunct Professor of Business
Vice President, Charitable & Philanthropic Strategist
First Citizens Wealth
B.A. University of North Carolina at Chapel Hill
J.D. Campbell University

David Butler
Assistant Professor of Business
B.B.A. Campbell University
M.T.W.M. Campbell University

Eugene W. Chianelli, Jr.
Visiting Professor of Business
Director
Cherry Bekaert
B.S. James Madison University
J.D. Saint Louis University School of Law
L.L.M. in Taxation, Washington University School of Law

Jesse C. Hubers, CPA
Assistant Professor of Business
Senior Manager
HBK CPAs & Consultants
B.B.A. Campbell University
J.D. University of Florida
LL.M. in Taxation University of Florida

Emily Jones
Adjunct Professor of Business
Vice President/Institutional Consultant
First Citizens Bank
B.B.A. Campbell University
M.B.A. Campbell University

Jason Morton
Partner
Webb and Morton, PLLC
B.A. North Carolina Wesleyan
J.D. University of Dayton
L.L.M. The George Washington School of Law

Michelle Osbourne
Director of Risk Management Institute
Associate Professor of Business
NC Department of Insurance
B.B.A North Carolina Wesleyan
M.B.A. Campbell University
DBA George Fox University

Kristy Meares Sides
Adjunct Professor of Business
Partner
Worrell Sides LLP
B.B.A. Campbell University
M.B.A. Campbell University
J.D. Wake Forest University School of Law

Phillip Strickland
Adjunct Professor of Business
Executive Director Trust and Fiduciary Services
Senior Vice President
First Citizens Bank
B.B.A. Campbell University
M.B.A. Campbell University
M.T.W.M. Campbell University

Kevin Ward
Senior Vice President
Fiduciary & Administration Managing Director (Retired)
Truist Bank
B.B.A. Campbell University
M.B.A Campbell University

Alex Yarem
Adjunct Professor of Business
Vice President / Institutional Consultant
First Citizens Bank
B.B.A. Campbell University
M.B.A. Campbell University

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For more information visit:
www.campbell.edu/BUSINESS
mtwm@campbell.edu

Or contact Tyler Britton,
Director of the Master of Trust and Wealth Management (MTWM) Program

Phone: 910.814.4355 | Email: britton@campbell.edu