

	ASSOCIATE MEMBER	ITA CERTIFIED TRUSTEE	ITA CERTIFIED MASTER TRUSTEE
Character & Fitness	No felonies, regulatory discipline, suspension of a license, or published customer complaints within a regulatory format, within the last 5 years (self-certified). A member has to adhere to our Code of Ethics and Member Best Practices and so state each year when annual dues are paid.	No felonies, regulatory discipline, suspension of a license, or published customer complaints within a regulatory format, within the last 5 years (self-certified). A member has to adhere to our Code of Ethics and Member Best Practices and so state each year when annual dues are paid.	No felonies, regulatory discipline, suspension of a license, or published customer complaints within a regulatory format, within the last 5 years (self-certified). A member has to adhere to our Code of Ethics and Member Best Practices and so state each year when annual dues are paid.
Academic	None	BA or BS	BA or BS
Education:	None required.	Continuing education related to trust administration, estate planning, investments, elder law, or special needs would need to be at least 15 hours a year, with at least two of those hours dedicated to ethics or trustee litigation. These would be self-certified for now with annual dues statement.	Continuing education related to trust administration, estate planning, investments, elder law or special needs would need to be at least 15 hours a year, with at least two of those hours dedicated to ethics or trustee litigation. These would be self-certified for now with annual dues statement.
Continuing Education	None	50 hours in previous five years	100 hours in previous ten years
Years of Professional Experience	N/A	A) 5 years serving as trustee in three family branches, & 3 different administrative environments, or B) 3 years experience having passed three Cannon courses or their equivalent	A) 10 years serving as trustee with JD, CPA, CFP, CTFA, or B) 10 years serving for at least 10 trusts with different families, in 5 different administrative environments.
Character and Professional References	Application	Application plus 5 professional references. At least two references must be from estate planning/probate attorneys with whom you have shared clients. References may not include more than one person in the firm you serve as trustee. If you are a trustee in a state like California that requires registration, please indicate the state and when you first registered.	Application plus 10 professional references. At least three references must be from estate planning/probate attorneys with whom you have shared clients. References may not include more than one person in the firm you serve as trustee. If you are a trustee in a state like California that requires registration, please indicate the state and when you first registered.
Fees	\$200 Annual dues only	\$250 application fee + \$300 annual dues.	\$250 application fee + \$400 annual dues.
Approval in ITA	Membership Committee	Certification Committee	Certification Committee
Exam	None	None for now	None for now

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Types of Trusts	N/A	Five years serving as trustee in different environments. These might include trusts with stocks, bonds, mutual funds, ETFs, real estate (whether income-producing or not) closely held business interests, private equity partnerships, or LLCs. Types of trusts might include a generation-skipping trust, an irrevocable trust under agreement or will, a “pot” trust with multiple beneficiaries, a revocable trust, a Grantor Retained Annuity Trust, a “directed trust,” a “structured trust,” a guardianship/conservatorship, or acting as a holder of a financial power of attorney.	Ten years serving as trustee in different environments. These might include trusts with stocks, bonds, mutual funds, ETFs, real estate (whether income-producing or not) closely held business interests, private equity partnerships, or LLCs. Types of trusts might include a generation-skipping trust, an irrevocable trust under agreement or will, a “pot” trust with multiple beneficiaries, a revocable trust, a Grantor Retained Annuity Trust, a “directed trust,” a “structured trust,” a guardianship/conservatorship, or acting as a holder of a financial power of attorney.

