

	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. These would be self-certified for now. 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. These would be self-certified for now. 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. These would be self-certified for now. A member has to adhere to our Code of Ethics and Member Best Practices and so state each year when annual dues are paid.
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.
Character and Professional References	Application and verification form.	5 professional references in addition to application and verification form.	10 professional references in addition to application and verification form.
Fees	Annual dues only	\$125 one time fee + annual & renewal dues.	\$300 one time fee + annual & renewal dues.
Approval in ITA	Membership Committee	Membership Committee	Membership Committee and Board Approval
Academic	None	BA or BS	BA or BS
Continuing Education	None	50 hours in previous five years	100 hours in previous ten years
Exam	None	None for now	None for now
Experience	None	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.