Member, Trust Institute (MTI®) Designation Transition Options

Q1. What is the structure of the new path leading to the Member, Trust Institute (MTI) designation?

Old path to the Member, Trust Institute (MTI) (Personal Trust – Estate and Trust Management Program)

Estate and Trust Administration Level 1 (0522) + Estate and Trust Administration Level 2 (0531) + Taxation of Estates and Trusts (0523) + Financial Services: An Overview (0591) + Two years industry experience = STI Diploma + Case Application Examination (0537) + Investment Funds in Canada (0200) + Two years specialty experience = MTI® Designation

Old path to the Member, Trust Institute (MTI) (Taxation Program)

Personal Tax Planning (0532) + Taxation of Estates and Trusts (0533) + Taxation in a Global Economy (0534) + Financial Services: An Overview (0591) + Two years industry experience = STI Diploma + Completion of Research Component + Two years specialty experience = MTI® Designation

New path to the Member, Trust Institute (MTI) (Estate and Trust Management Program)

Estate and Trust Administration + Taxation Considerations for Estates and Trusts + Laws of Estates and Trusts + Ethics and the Client Experience + Estate and Trust Asset Management + Canadian Securities Course + Case Application Examination + Three years experience in Estates and Trusts = MTI® Designation

Note: *With the exception of the Canadian Securities Course, courses must be completed not more than 7 years prior to application to write the Case Application Examination.*

Member, Trust Institute (MTI®) Designation Transition Options

COMPLETE REQUIREMENTS UNDER OLD PATH

Q2. Is there a deadline for enrolling and completing courses under the old paths in order to obtain my STI or MTI?

Students wishing to complete courses under the old path have until **December 31, 2010** to enroll in their required courses. They will have until **December 31, 2011** (one year) to successfully complete their courses in order to be eligible to apply for the STI diploma and/or MTI designation under the old path.

Q3. If I'm enrolled in a course to complete the requirements for the old MTI Designation or STI Diploma can I buy a course extension?

Unfortunately, no extensions will be granted for completion of courses under the old MTI or STI paths. All courses must be complete by **December 31, 2011**.

Q4. When is the last day that I can apply for the STI diploma or MTI designation under the old paths?

Students have until **March 31, 2012** to apply for the STI diploma or the MTI designation under the old paths. This means that by this date, they will need to have met all program requirements (i.e., course completion, industry experience, etc.). After **March 31, 2012,** CSI will stop granting the STI. Individuals pursuing the MTI under the old path who are not able to complete all program requirements by **March 31, 2012**, will need to complete requirements under the new path.

Q5. Once I've completed all program requirements under the old path and I'm ready to apply for the STI or MTI, what do I need to do?

STI Diploma

Once individuals have completed all program requirements and are ready to apply for the STI, they will need to:

- Complete the STI diploma Application form, including attestation to work experience
- Attestation to abide by the MTI Code of Ethics and Ethical Misconduct Process

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MTI Designation (Taxation)

Once individuals have completed all program requirements and are ready to apply for the MTI (Taxation), they will need to:

- Complete the MTI Designation Application form, including attestation to work experience
- Attestation to abide by the MTI Code of Ethics and Ethical Misconduct Process

MTI Designation (Personal Trust – Estate and Trust Management)

Once individuals have completed all program requirements and are ready to apply for the MTI (Estate and Trust Management), they will need to:

- Complete the MTI Designation Application form, for the NEW MTI Estate and Trust Management program, including attestation to work experience
- Pay a $150 application fee and agree to the trademark license agreement
- Attestation to abide by the MTI Code of Ethics and Ethical Misconduct Process

Note: *Individuals who complete all requirements for the MTI Designation (Estate and Trust Management) can apply for their designation as of January 2011. Individuals will not be able to apply before this date.*

Q6. Once I have obtained my MTI designation, what will I be required to do to maintain my membership status?

To represent themselves as an active MTI® designate and maintain the value and prestige associated with the designation, individuals are required on an annual basis to:

- Complete 12 hours of continuing education
- Submit an annual designation application
- Pay a $150 annual designation license fee
- Commit to continued ethical standards in estates and trusts and trademark use

Each MTI® member must earn 12 CE hours per Calendar Year:

- 12 hours of continuing education annually.
- The CE cycle runs on a calendar year basis, beginning on January 1st and ending on December 31st. CE requirements will begin in the full year after the student has achieved their MTI designation.

CE should be assessed against the MTI CE Assessment Tool that will be prepared to reflect the competencies required of a trust professional and available in January 2011.

Member, Trust Institute (MTI®) Designation Transition Options

COMPLETE REQUIREMENTS UNDER NEW PATH

Q7. If I have already completed courses under the old path will I receive any course equivalencies?

IF YOU HAVE ALREADY COMPLETED THIS COURSE UNDER THE OLD PATH:	YOU WILL RECEIVE CREDIT FOR THE FOLLOWING COURSE(S) UNDER THE NEW PATH:
Estate and Trust Administration: Level 1 (0522)	Estate and Trust Administration (ETA)
Estate and Trust Administration: Level 2 (0531)	Laws of Estates and Trusts (LET) Ethics and the Client Experience (ECE) Estate and Trust Asset Management (ETM)
Taxation of Estates and Trusts (0523) or Taxation of Estates and Trusts (0533)	Taxation Considerations for Estates and Trusts (TET)

Q8. I am currently enrolled in a course under the old path. Can I transfer my enrolment from this course to the new courses under the new path?

If you are currently enrolled in the Estate and Trust Administration: Level 1 (0522) course, you have until December 20, 2010 to transfer to the Estate and Trust Administration (ETA) course.

CLICK FOR MORE DETAILS.

Transfers are not available for any of the other courses under the old path.

Member, Trust Institute (MTI®) Designation Transition Options

Q9. When will the courses under the new path be available?

The new courses under the new MTI path will be available as follows:

- Canadian Securities Course (CSC) – currently available
- Estate and Trust Administration (ETA) – currently available
- Laws of Estates and Trusts (LET) – available December 2010
- Estate and Trust Asset Management (ETM)– available December 2010
- Taxation Considerations for Estates and Trusts (TET) – available December 2010
- Ethics and the Client Experience (ECE) – available December 2010
- Case Application Examination (0537) – currently available

Q10. How many study hours can I expect to spend studying for courses under the new path?

- Canadian Securities Course (125 – 200 study hours)
- Estate and Trust Administration (80 – 100 study hours)
- Taxation Considerations for Estates and Trusts (20 – 30 study hours)
- Laws of Estates and Trusts (20 – 30 study hours)
- Ethics and the Client Experience (20 – 30 study hours)
- Estate and Trust Asset Management (20 – 30 study hours)
- Case Application Examination (up to 30 hours of review of prior course materials and preparation of a sample case examination)

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Q11. If I want to change to the new path, do I need to advise CSI?

No. Individuals are not required to advise CSI that they want to change to the new path. However, they should ensure they understand which courses under the new path they still need to complete and enroll for those courses when they become available.

For example:

IF YOU HAVE ALREADY COMPLETED THESE COURSES UNDER THE OLD PATH:	YOU WILL RECEIVE CREDIT FOR THE FOLLOWING COURSE(S) UNDER THE NEW PATH:	WHICH MEANS YOU WILL STILL NEED TO COMPLETE THE FOLLOWING COURSES:
Estate and Trust Administration: Level 1 (0522)	Estate and Trust Administration (ETA)	Taxation Considerations for Estates and Trusts (TET) Canadian Securities Course (CSC) Case Application Examination (0537)
Estate and Trust Administration: Level 2 (0531)	Laws of Estates and Trusts (LET) Ethics and the Client Experience (ECE) Estate and Trust Asset Management (ETM)	

Q12. Once I've completed all program requirements under the new path, what do I need to do?

Once individuals have completed all program requirements and are ready to apply for the MTI under the new path, they will need to:

- Complete the MTI Designation Application form, including attestation to work experience
- Pay a $150 application fee and agree to the trademark license agreement
- Attestation to abide by the MTI Code of Ethics and Ethical Misconduct Process

Q13. When can I apply for the MTI under the new path?

Individuals who complete all program requirements under the new path may apply for their MTI as of January 2011. Individuals will not be able to apply before this date.

Member, Trust Institute (MTI®) Designation Transition Options

Q14. Once I have obtained my MTI designation, what will I be required to do to maintain my membership status?

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CE should be assessed against the MTI CE Assessment Tool that will be prepared to reflect the competencies required of a trust professional and available in January 2011.