

# HOW TO JOIN

## PROGRAM / ROUTE CHOICES

### Certificate in Estate and Trust Administration (CETA)

Comprehensive industry preferred standard of foundations delivering practical career development

### Assessment by Exam (Diploma Program)

In-depth academic and professional expertise for aspiring or committed industry practitioners

### Assessment by Essay

Candidates prove established, post-designation, in-depth practice experience and knowledge

### Assessment by Expertise

A peer refereed and scrutinized application process reserved for the most senior and experienced industry specialists



## REQUIREMENTS

Qualifying Designation  
Not Required

Post-secondary and/or one year wealth industry work experience

Qualifying Designation  
Recommended

Industry Experience  
Not Required

Qualifying Designation  
Required

Industry Experience  
5+ years post-designation/qualification

Qualifying Designation  
Required

Industry Experience  
10+ years



## COMPONENTS AND ELEMENTS

Three online self-study courses;  
plus one final exam  
Recommended 30-80 hours  
of study time per exam

Four online self-study courses  
Recommended 80-120 hours  
of study time per exam

Three scholarly essays of  
journal publication quality  
(2,500-3,000 words) reflecting  
serious consideration and  
in-depth understanding  
of selected topics

Application, education,  
and practice experience  
examined and measured  
against relevant sections  
of Diploma Program  
Personal statement and  
references required



## MAXIMUM ALLOWED TIME TO COMPLETION

4 years

Minimum Passing Grade  
60%

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Applications can take up to  
6 months for assessment by  
local; national; and subsequently,  
worldwide committees



## NEXT STEPS

**OPTION:**  
Proceed to Assessment by  
Exam (Diploma Program)  
Eligible for Diploma  
course 3 exemption

+ 2 years proven  
practice experience?  
If yes, apply for TEP designation  
If application is approved,  
TEP designation and full  
membership status is granted

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