

Solutions and Service Delivery > Provision of Trust & Estate Planning Services

Title	Promote trust services to clients
Code	106611L5
Range	Selling trust services to clients. This applies to selling of different kind of trust products and services, e.g. irrevocable vs. revocable trust, charitable trust, and trust to private banking clients.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Evaluate trust services                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Demonstrate professional knowledge in trust in order to provide suitable suggestion</li> <li>• Evaluate the features of different trust services in order to identify the needs of clients</li> </ul> </li> <li>2. Identify business opportunities                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Develop and maintain client contacts with intermediaries working for HNW individuals / families</li> <li>• Identify sales opportunities for developing new trust relationships or new business with existing trust relationships</li> <li>• Present to clients the features and benefits of trust services of the bank in order to create awareness and cultivate referral opportunities</li> </ul> </li> <li>3. Demonstrate professional attitude                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Deliver the presentation in a clear and articulated manner</li> <li>• Ensure the services communicated to clients are in accordance with the applicable regulatory requirements</li> </ul> </li> </ol>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Development and delivery of presentation to potential clients of trust services. The presentation should be able to outline the features of the trust services clearly and demonstrate how the services can suit the needs of the clients.</li> </ul>
Remark	