



THE AMERICAN COLLEGE
CARY M. MAGUIRE
CENTER FOR ETHICS
IN FINANCIAL SERVICES

Trust Certificate Program

Your investment in building trust for lasting impact

TheAmericanCollege.edu/Trust-Certificate-Program



THE
AMERICAN
COLLEGE
OF FINANCIAL SERVICES®

Objectives and Key Outcomes

The financial landscape is constantly evolving. Regulations shift, client needs change, and building strong stakeholder relationships remains an ongoing priority. The Trust Certificate Program equips you with the tools you need to overcome these hurdles and develop skills to address future complexities as a resilient, effective leader.

Through this program, you'll:

- ✔ **BECOME A TRUSTED PARTNER TO STAKEHOLDERS**
Build deeper connections and stronger partnerships with your colleagues and other stakeholders.
- ✔ **IDENTIFY AND OVERCOME BARRIERS TO TRUST**
Learn to recognize and address factors that erode trust, taking proactive steps to foster a culture of trust within your organization.
- ✔ **MASTER CLIENT TRUST**
Develop a deeper understanding of how trust impacts client behavior and retention. Equip yourself to guide your organization in fostering trust-based relationships that translate into long-term success.
- ✔ **NAVIGATE INDUSTRY TRUST-RELATED CHALLENGES**
Learn how to overcome common trust barriers specific to the financial services industry and identify strategies to rebuild trust when needed.



Program at a Glance*

The Trust Certificate Program goes beyond theory. By leveraging the expertise of The American College of Financial Services and its Cary M. Maguire Center for Ethics in Financial Services, you'll be equipped with:

- **Research-backed insights:** Gain actionable insights from the Center for Ethics in Financial Services' proprietary research on trust and its impact on business performance.
- **Immediate application:** Apply frameworks developed by the Center for real-world application to address trust challenges in the financial services industry.
- **Sustainable strategies:** Learn adaptable strategies to navigate existing and future complexities, while building trust across all levels of your organization.
- **Measurable results:** Improve morale, retention, and revenue growth through stronger client and advisor trust.

Participants will receive a Certificate of Completion upon successful course completion.

Tuition \$2,000 to \$3,000 per student (based on cohort size and course choice)	Timing 6 Hours (TRST 101), 10 Hours (TRST 100)
Format Delivered on-site, hybrid, or fully remote	
<i>This program is eligible for CE credit.</i>	

*Both company-specific and multi-company cohort options are available, with hours varying based on the chosen program format.

Choosing Your Program

Students can choose one of two course options:

TRST 101

Strategies for Building Trust: A Practice-Based Certificate Program

- Live program designed for financial professionals, advisors, and leaders from various financial services institutions
- Program provides six hours of fully-remote education, with CE credits
- Available for open enrollment via The College's website

TRST 100

Advanced Strategies for Building Trust: A Practice-Based Certificate Program

- Live program tailored for home office leaders at a single company
- Provides 10 hours of education, including a capstone project, and CE credits
- Delivered on-site, hybrid, or fully remote

Participant Profile



Designed for financial services professionals and leaders, the Trust Certificate Program equips you with actionable tools to:

- Drive overall firm growth and profitability.
- Build a high-performing team environment built on trust and collaboration.
- Increase advisor productivity and/or client retention.

Firm Types

- Insurance Companies
- Wirehouses
- Broker-Dealers
- Registered Investment Advisors
- Investment Managers

“Loved this course! Every leader should learn more about trust and how it impacts every relationship and interaction we have, both publicly and internally.”

—PROGRAM PARTICIPANT

Inside Our Program

Sample Schedule*

MODULE	TOPIC	LEARNING GOALS
1	Understanding What Trust Entails	Apply critical insights about the science of trust and its unique characteristics
2	Consumer Trust: Beyond Expectations	Learn and employ the Relationship Balance Model to identify consumer trust gaps based on consumer data about trust expectations
3	How Do Firms Inspire Trustworthiness?	Develop strategies for improving trustworthiness by leveraging corporate culture and behavioral frameworks
4	Stakeholder Culture and Trust	Improve collaboration across stakeholders with disparate goals
5	Capstone Project Presentations [<i>Advanced Strategies</i> course only]	Analyze and propose solutions to a real-life trust challenge

*Program and schedule subject to change.

Meet Your Instructors



AZISH FILABI, JD, MA

Managing Director, The American College Center for Ethics in Financial Services

Associate Professor of Business Ethics, Charles Lamont Post Chari of Business Ethics, The American College of Financial Services



CATERINA BULGARELLA, PhD

Leadership Strategy Fellow, The American College Center for Ethics in Financial Services

Adjunct Professor of Industrial and Organizational Psychology, New York University



DOMARINA OSHANA, PhD

Director of Research and Operations, The American College Center for Ethics in Financial Services

Expand Your Opportunities

The American College of Financial Services delivers applied financial knowledge and education, promotes lifelong learning, and advocates for ethical standards for the benefit of society.

As a lifelong learning partner, you will benefit from:

- Extensive professional network of one-in-five financial advisors educated by The College
- Ready-to-use knowledge delivered by plugged-in, industry-leading experts
- Interactive community engagement featuring frequent webinars, conferences, and professional development events
- Advanced planning skills and real-world application not delivered elsewhere
- Modern education through the latest in mobile-friendly, e-learning technology
- Prestigious pedigree and client recognition from nearly 100 years of academic excellence



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Your Trusted Resource on Ethics in the Industry

The Center for Ethics in Financial Services is dedicated to raising the level of ethical behavior in the financial services industry – this program is your best investment in a thriving and successful future! Enroll today and unlock the power of trust.

For more information, including the dates of our next available cohort, visit

TheAmericanCollege.edu/Trust-Certificate-Program or email Ethics@TheAmericanCollege.edu.



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