

Trust Administration Program

The University of Sioux Falls offers three courses to help those wanting to learn more about the South Dakota trust industry. These classes are for anyone currently employed in the trust industry looking to advance their careers, or for current undergraduate students desiring to gain knowledge about the South Dakota trust industry.



The objectives of the classes are to **introduce students to the following concepts:**

1. Fiduciary Standards
2. Bank Secrecy Act/Anti-Money Laundering (BSA/AML) and Related Regulation
3. Foreign Trust Administration Considerations
4. Modern Trust Concepts
5. Principal and Income Law
6. Fiduciary Income Tax, Gift & Estate Tax and Generation Skipping Tax
7. Estate Planning Strategies Utilizing Trusts
8. Ethics
9. Trust Investments/Unique Assets

University of Sioux Falls Admissions Office

1101 W. 22nd St
Sioux Falls, SD 57105

- (605) 331-6600
- (800) 888-1047
- usiouxfalls.edu
- admissions@usiouxfalls.edu

There are three course levels offered, each to be offered completely online.

INTRO TO TRUST ADMINISTRATION

This course covers the foundational concepts of South Dakota trust administration targeted towards students/newcomers to the industry with little to no previous experience or knowledge of trusts.

Prerequisite: BUS325 or equivalent industry experience with finance

INTERMEDIATE TRUST ADMINISTRATION

This course is a second course to a three part series on South Dakota trust administration and will include a deeper dive into topics covered in Trusts I.

Prerequisite: Intro to Trust Administration or 1-3 years of industry experience

ADVANCED TRUST ADMINISTRATION

This course is the final course in a three part series covering South Dakota trust administration concepts. Advanced discussions, applications and concepts about trust administration will be covered.

Prerequisite: Intermediate Trust Administration or 1-3 years of industry experience



For more information
or to apply, visit:

usiouxfalls.edu/trustadmin