



金融監督管理委員會

FINANCIAL SUPERVISORY COMMISSION, R.O.C.

Trust 2.0 "Comprehensive Trust" Phase 2 Implementation Plan

Financial Supervisory
Commission

September 2022



Excellent Results Achieved with Trust 2.0

★Organizational Structure

Gradually increased the functions and organization structure of the trust department

★Cross-Industry Alliances

Alliance partners have been expanded from elderly care trust industries to family trust professionals



Rapid Growth of Elderly Care Trust & Employee Benefit Trust



★Regulations and Self-Governing Rules

- √Included in the evaluation of the remuneration mechanisms
- √Eased restrictions on marketing and promotion
- √Increased the maximum amount of promotional gifts

★Talent Development

Cultivated and certified "financial advisors for seniors" and "family trust advisors"



Three Core Objectives of the Trust 2.0 Phase 2 Plan

1

TRUST SERVICES FOR SATISFYING THE NEEDS
IN ALL STAGES OF LIFE

2

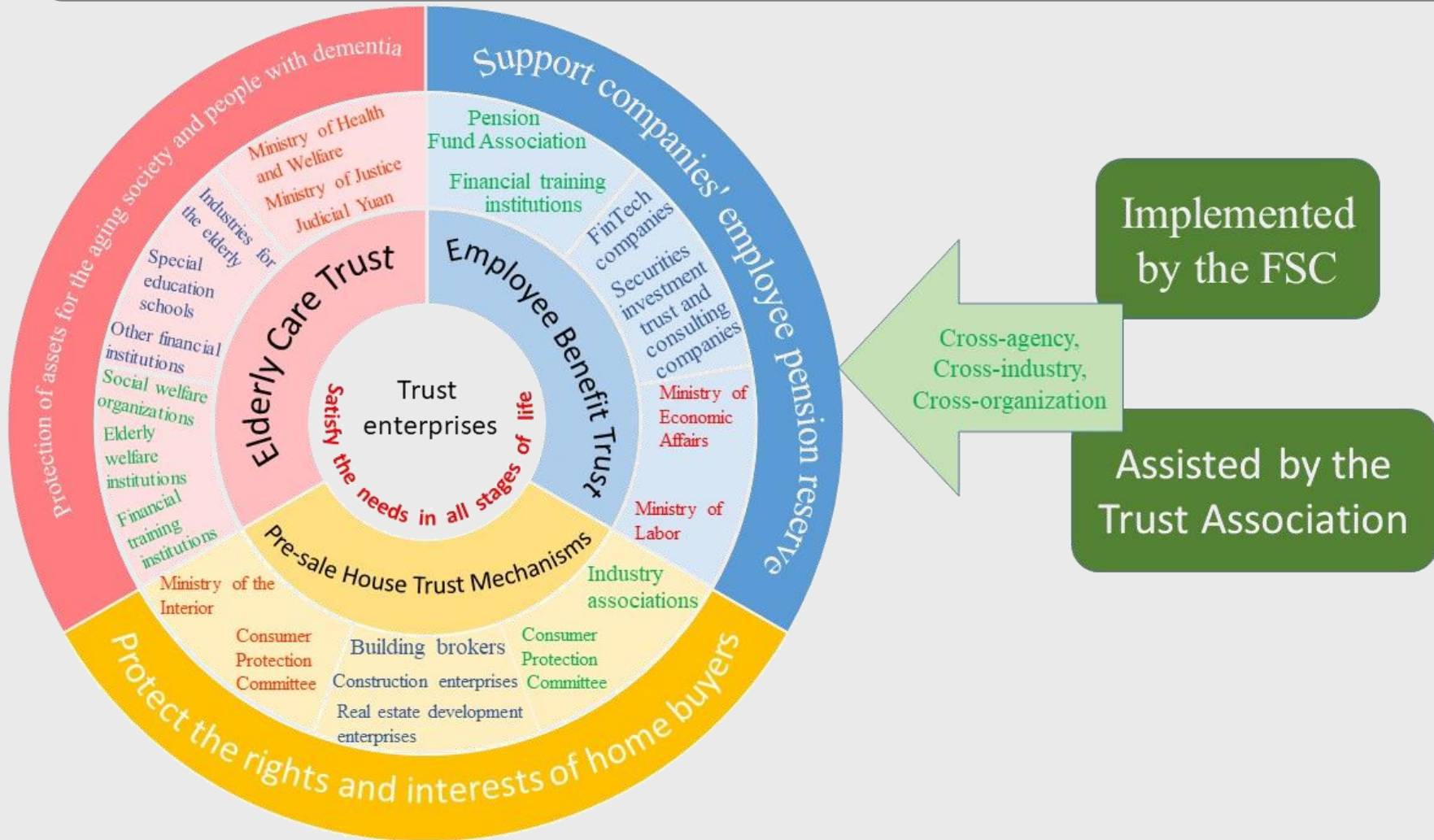
EXPANSION AND INTENSIFICATION OF
CROSS-INDUSTRY ALLIANCES FOR
TRUSTS

3

ENHANCE THE KNOWLEDGE AND UNDERSTANDING
OF TRUST SERVICES FOR THE ELDERLY, PEOPLE WITH
DEMENTIA AND DISABILITIES



Cross-Industry Collaboration and Alliances for the Trust 2.0 Phase 2 Plan





Four Major Strategies of the Trust 2.0 Phase 2 Plan

Regulations and
Business
Development



Talent Cultivation,
Promotion,
and Industrial-
Academic
Cooperation



Evaluation and
Reward
Mechanisms



Cross-Industry
Alliances





12 Important Measures of the Trust 2.0 Phase 2 Plan

Formulate and review legislation to enhance the governance of real estate investment trusts (REITs)

01

Continue to guide financial institutions to gradually elevate the functions of their trust departments and give them a more prominent position within their organizational structure

02

Formulate the family trust legal framework and taxation environment

03

Continue to coordinate and enhance pre-sale house trust mechanisms

04

05

Encourage companies to provide employee benefit trust

Establish guidelines for financial services for people with dementia in related self-governing rules

06



12 Important Measures of the Trust 2.0 Phase 2 Plan

Promote related certification systems and advanced training and retraining programs

07

Enhance the knowledge of financial services for the elderly, people with **dementia and disabilities**

08

Enhance industrial-academic cooperation for trusts
Promote the "Campus Trust Development Plan"

09

Organize training courses for trust supervisors

10

Set up evaluation schemes to reward trust enterprises and high-performing employees

11

Promote cross-industry collaboration for trust enterprises and improve related measures for the friendly treatment of the elderly and customers with dementia

12



金融監督管理委員會

FINANCIAL SUPERVISORY COMMISSION, R.O.C.

Continue to enhance trust services
and use trusts to create a better society

