Finance, Trust

STEP Advanced Certificate in Advising the Family Business

Course Details

Price

£1,100.00

Length

Online self-study over a period of 4 months.

Course Overview

This course provides practical knowledge about what differentiates family businesses from other types of clients and introduces theories and frameworks that are needed to better understand family business dynamics.

It provides practitioners with the practical knowledge about what differentiates family businesses from other types of clients and introduces theories and frameworks that are needed to better understand and support family business dynamics.

- Gain in-depth expertise: Improve your understanding of the common concerns, transitions, and difficulties within a family business to better understand family business dynamics and enhance your ability to support and advise family businesses.
- Practical focus: Practical advice and guidance written by practitioners, for practitioners.

This Advanced Certificate can be taken as part of the STEP Diploma.

Content

- The main theories that are now shaping family business knowledge and practice
- The complexities of working with family businesses
- The importance of getting to know the family
- Family business dynamics, governance issues and sources of conflict
- Ways to help family businesses through change
- What competence as a family business adviser looks like

Benefits

- A global perspective: Suitable for all professions, globally and culturally, to ensure different specialisms can collaborate to better serve their family business clients. It will also provide access to a wider business and professional community of practice, helping you identify business opportunities in emerging markets and increasing your credibility with prospective clients.
- Build valuable connections: Network with like-minded professionals in varied roles and firms from all over the world.
- Industry recognition: Awarded in association with Alliance Manchester Business School, a Faculty of the University of Manchester.

Prerequisites

This course is designed for all professionals working with a family business looking to expand in their profession and carry out their role more effectively.

Students of this course typically include:

- lawyers/solicitors/attorneys
- accountants
- financial planners
- trust managers (senior)
- wealth managers
- tax advisers
- compliance officers/managers
- bankers

- family office executives

To take this course you need to be a member of STEP at Affiliate level or higher. Find out more about **how to join STEP here** and allow sufficient time (approximately 5 business days) for your membership application to be processed before course enrolment is possible.

Assessment

The course is assessed by way of a 3,500-4,000 word written assignment, based on a case study published two months before submission.

Next Steps

Whilst we at the GTA promote and facilitate the STEP programmes, bookings are made directly with CLT International, STEP's exclusive training provider. To enrol visit STEP Advanced Certificate in Advising the Family Business | Delivered by CLTi

Course Tutor

CLT International

CLT International has been providing certificated training and qualifications to professionals in the private client and wealth management industry since 1999. As an international company operating in over 90 global centres, they provide training to over 3,000 delegates per year and are also the exclusive provider for STEP, the worldwide professional association for those advising families across generations.