

Finance, Trust

STEP Advanced Certificate in Family Business Governance

Course Details

Price

£1,400.00

Length

Online self-study over a period of 4 months.

Course Overview

This course demonstrates the importance of family business governance, examining the different situations in the lifecycle of the family, the owners and the business that require more formal governance, and highlighting the limitations of natural governance.

It enables advisers to develop ever more creative and innovative solutions to help family business clients face the challenges that are unique to them by virtue of being a family in business together, and plan for the future of their business and their family's future.

- Gain in-depth expertise: Improve your understanding of the role that ownership governance, family governance and business governance can play during the different situations in the lifecycle of the family, the owners and the business.
- Practical focus: Practical advice and guidance written by practitioners, for practitioners.

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

Flexible learning that works for you

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Content

- How to apply family business principles and theories in practical contexts
- The value advisers can add in helping to shape the governance of family businesses
- The different types of governance within a family business
- The unique challenges that families face with respect to ownership governance, family governance and business governance
- Practical tools and techniques to help the family business achieve its objectives

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 please visit [STEP Advanced Certificate in Family Business Governance | 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.