Finance, Trust

STEP Advanced Certificate in Trusts: Law and Practice (International)

Course Details

Price

£1,950.00

Length

Online self-study over a period of 4 months, plus 4 interactive , tutor-led sessions

Course Overview

Master the trust concept and trustee responsibilities with the STEP Advanced Certificate in Trusts: Law and Practice. Take a step closer to the STEP Diploma and achieve global recognition in the international trusts industry with this Advanced Certificate.

This course provides practitioners with the technical knowledge and practical skills required to manage wealth held in trust in a professional and effective manner in compliance with industry best practice.

- Gain in-depth expertise: Improve your technical knowledge of the trust concept and the role, powers, and duties of a trustee.
- Practical focus: Practical advice and guidance written by practitioners, for practitioners on everyday matters encountered in international trust management from creation, modern usage, and administration of trusts.

This course can be taken as part of the STEP Diploma.

Content

- Review of the trust concept
- Marketing trust services and accepting new business
- The trust instrument — part 1: preliminary provisions
- The trust instrument — part 2: dispositive provisions
- The trust instrument — part 3: administrative provisions
- Choice of law to govern the trust
- The role and status of a protector
- Estate planning and forced heirship issues
- Asset protection trusts
- Purpose trusts
- Private foundations

Benefits

- Build valuable connections: Network with like-minded professionals in varied roles and firms from all over the world.
- Industry recognition: Recognised worldwide as the 'gold-standard' benchmark qualification for those working in the international trusts industry by employers, regulators, clients, and professionals, and is awarded in association with Alliance Manchester Business School, a School of the University of Manchester.

Prerequisites

The course is designed for all professionals moving into or working in financial services (specifically trusts and corporate services), who wish to develop their understanding and knowledge of this area.

Students of this course typically include:

- trust assistants/officers/administrators
- trust managers (senior)
- trustees/fiduciaries

- corporate administrators
- lawyers/solicitors/attorneys
- wealth managers
- accountants
- tax advisers
- compliance officers/managers
- private bankers
- secretarial/administration
- client relations/marketing/sales
- financial/estate planners

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

A 4-hour final examination (comprising multiple choice and long-answer questions).

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 Trusts: Law and Practice (International) | 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.