Finance, Trust

STEP Certificate in International Trust Management

Course Details

Price

£1,900.00

Length

Self-study over a period 5 months, plus 4 interactive, tutor-led sessions

Course Overview

The STEP Certificate in International Trust Management introduces you to the fundamentals of international trusts in a global and local environment.

- The gold-standard professional qualification for those working in the industry; globally recognised by employers, regulators and clients.
- Grow your network of like-minded professionals.

Content

- The fundamentals of trust work in an international environment
- The evolution of equity and the law of trusts

- The creation of a valid trust
- Types of trusts and interests
- Modern uses of offshore trusts
- The administration of trusts
- The evolution, features and advantages of offshore asset-holding companies
- The incorporation, funding and dissolution of companies
- The roles, rights, powers and duties of shareholders, directors and other officers
- The services offered by offshore corporate services

Benefits

A globally recognised entry level qualification, this Certificate is ideal for employers, regulators and clients who are new to the industry or those seeking thorough foundation-level knowledge.

- Build a strong foundation in trust and estate practice by learning the key principles of trust law
- Gain valuable insight into international trusts in both global and local contexts
- Earn industry recognition and achieve a qualification awarded in association with Alliance Manchester Business School, the University of Manchester.

Prerequisites

This course is suitable for:

- trust managers/officers
- 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. 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 four-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 Certificate in International Trust Management | Online | 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.