Finance, Trust

STEP CPD Learning: Digital Assets

Course Details

Price

£295.00

Length

10 hours of online self-study over a period of up to 12 months

Course Overview

Confidently navigate digital assets in estate planning and administration with the knowledge and skills essential for today's digital world.

Digital assets are now part of everyday life and increasingly form a key part of clients' estates. From cryptocurrencies and cloud storage to social media accounts and domain names, estate practitioners need the skills to manage these assets confidently and securely.

This course will equip you with the practical tools and expert insight to meet growing client demand, support families during incapacity or bereavement, apply consistent best-practice approaches, and minimise risk by ensuring digital assets are properly identified, valued, and transferred.

Content

- Digital Asset Estate Planning Best Practice - how best to deal with digital assets as part of a client's estate planning

- Digital Asset Estate Administration Best Practice - how to identify, access and deal with digital assets in the administration of an estate

Benefits

- Control your own learning journey – this interactive elearning course is entirely online, so you can access it anytime, anywhere
- Study and learn at your own pace, with 12 months' access to the course material – learn whenever you want, and refer to it as many times as you need
- Demonstrate your new learning to your employer or CPD provider with a Certificate of Completion, awarded when you've finished the optional end-of-course assessment

Prerequisites

This course is designed for estate practitioners around the world. It supports anyone working with clients to plan, manage, or administer digital assets, whether they are looking to build their knowledge or become the go-to expert in their firm.

- Legal and trust practitioners
- Will writers and instruction takers
- Executors and estate administrators
- Paralegals and support staff
- Tax advisers and accountants
- Financial advisers and planners
- Banking and wealth management professionals

Assessment

The course includes an optional end of course assessment comprising 10 multiple-choice questions. Upon successful completion, you will receive a certificate to recognise your achievement.

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 CPD Learning Course: Digital Assets | STEP