Finance, Trust

STEP Diploma

Course Details

Length

Approximately 2 years (4-6 months online learning for each of the 4 chosen Advanced Certificates).

Course Overview

The benchmark qualification for trusts and estates. Recognised globally; tailored for you.

Content

Combine four Advanced Certificates to make up your Diploma.

Choose at least one Advanced Certificate from Set 1: Private Wealth Administration and Governance

- STEP Advanced Certificate in Company Law and Practice
- STEP Advanced Certificate in Trusts: Law and Practice (International)
- STEP Advanced Certificate in Trustees' Duties: Investment and Management of the Trust Fund (International)

Choose at least one Advanced Certificate from Set 2: Tax and Compliance

- STEP Advanced Certificate in UK Tax for International Clients
- STEP Advanced Certificate in the Principles of International Taxation, AML and Compliance

Choose up to two Advanced Certificates from Set 3: Electives

- STEP Advanced Certificate in Advising the Family Business
- STEP Advanced Certificate in Family Business Governance
- STEP Advanced Certificate in Cross-Border Estates
- STEP Advanced Certificate in Trust Disputes

Each course is accredited by Alliance Manchester Business School (AMBS), ensuring the highest quality of education and professional recognition.

A recommended combination is those Advanced Certificates relating to **International Trust Management**:

1. STEP Advanced Certificate in Company Law and Practice (Set 1)
2. STEP Advanced Certificate in Trusts: Law and Practice (International) (Set 1)
3. STEP Advanced Certificate in Trustees' Duties: Investment and Management of the Trust Fund (International) (Set 1)
4. STEP Advanced Certificate in the Principles of International Taxation, AML and Compliance (Set 2)

The typical duration for completing the four Advanced Certificates is around two years. With flexible online study options, you can design your own study journey, balancing work and life commitments. Most students spend four to six hours per week on study, with each certificate requiring approximately four months of preparation before exams. It is possible to study two certificates simultaneously if you have the time and commitment.

CLT International is STEP's exclusive training provider and the Advanced Certificates you choose will all be delivered through CLTI's online learning platform.

Benefits

The STEP Diploma is the benchmark qualification for those working in the field of trusts and/or estates. It is designed and delivered by practitioners, for practitioners, and is recognised and respected by employers, regulators, and clients across the world. Completing this diploma will empower you to take your career to new heights and enable you to:

- Expand your technical knowledge
- Develop your own professional competence
- Enhance your ability to give advice to clients
- Become a Full Member of STEP, enabling you to use the TEP designation
- Gain a globally recognised qualification

Prerequisites

The STEP Diploma is designed for professionals working in the trusts and estates industry. Whether you are an accountant, lawyer, banker, trust officer, wealth manager, or compliance officer, this qualification will help you develop the skills and knowledge needed to excel in international trust management.

The diploma is ideal for professionals looking to:

- Administer and maintain trusts and company accounts.
- Provide tax planning advice to high-net-worth individuals.
- Review and prepare trust and company financial statements.
- Offer estate planning solutions, including wealth structuring and succession planning.
- Ensure compliance with global regulations such as FATCA and CRS.

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

Each Advanced Certificate is assessed either by means of an examination or assessment(s).

Next Steps

Please follow the links above to take you to the relevant page for each Advanced Certificate where you can find the process to enrol.

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.