Finance, Trust

# STEP Professional Postgraduate Diploma in Private Wealth Advice

## Course Details

**Price**

£6,750.00

**Length**

Online self-study for a period of 6 months, plus monthly virtual weekend sessions

## Course Overview

This is an executive programme for experienced practitioners in the wealth management field looking to develop their understanding of critical thinking, risk assessment and business strategy and wanting to take the next step in their professional career.

Enhance your knowledge, expertise and leadership skills with technical masterclasses focusing on emerging, specialist areas of practice. The course also includes exclusive sessions for aspiring strategic leaders to enhance their leadership and commercial skills.

The STEP Professional Postgraduate Diploma in Private Wealth Advice is designed for aspiring leaders to elevate your expertise in wealth management and estate planning.

This programme will broaden your understanding of critical thinking, risk assessment and business strategy. Once you complete this course, you will gain a first-class, specialist qualification and have the expertise needed to take your career to the next level.

This dynamic course provides an unparalleled learning experience to help you excel in the fast-paced world of private wealth advising, with:

- Expertise that matters with real-world application: Develop technical content on key subject areas relating to private wealth advice to deal with the risks and potential hurdles you and your organisation face.
- Practical focus: Innovative qualification that delivers immediate practical benefit in the workplace.
- Global perspective: Explore international best practice and trends preparing you to serve a diverse clientele in a globalised world.

# Content

Enhance your knowledge, expertise and leadership skills with technical masterclasses focusing on emerging, specialist areas of practice and exclusive sessions for aspiring senior and strategic leaders to enhance their leadership and commercial skills.

- Technical masterclasses:
- Strategic Risk Management for Leaders
- Family Business Advising
- Trust Disputes
- Cross-Border Succession
- Strategic Philanthropy
- Digital Assets
- Compliance for Trustees
- International Tax
- Enhancement sessions
- Sales and Marketing Considerations
- Leadership and Judgement

# Benefits

- Career advancement: Elevate your career prospects and earning potential.
- Build valuable connections: Network with like-minded professionals in varied roles and firms from all over the world including the UK and Crown Dependencies, Singapore, Hong Kong, the Caribbean, the US and Canada.

- Industry recognition: Successful completion fulfils the educational requirement for Full STEP membership, enabling you to join the exclusive but growing community of Full STEP members using the TEP designation.
- This course has been accredited with 90 Masters Level credits by the University of Law.

# Prerequisites

To join the STEP Professional Postgraduate Diploma in Private Wealth Advice, applicants must:

- Be a member of STEP at Affiliate level or higher, or have a relevant professional qualification at level 6 or higher or relevant vocational degree, and
- At least five years industry experience.

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 programme is assessed through the creation of a reflective journal consisting of eight masterclass commentaries (1,000–1,500 words) and a two-hour oral assessment based on course competencies and content knowledge.

# 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 Professional Postgraduate Diploma in Private Wealth Advice | Online Programme | 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.