Finance, Investments & Funds, Trust

Trust Asset Oversight - A Concise Guide

Course Details

Price

£95.00

CPD Points

1.00

Length

1 hour (13:00-14:00)

Course Overview

This 1-hour introductory/refresher course is aimed at Trust and Company Administrators who need to monitor trust assets within a portfolio. It will enable you to understand valuation reports and identify areas of concern.

Content

This course will cover the following topics:

- Outsourcing
- Understanding Valuation Reports
- Monitoring Trust Assets (responsibility)
- Tracking Investment Progress
- Benchmarking – is it a good enough return?

- When to flag concerns
- Being proactive

Benefits

The course is ideal for anyone involved in the administration of Client Trusts and Companies in an Offshore Jurisdiction.

Next Steps

If you would like to book a place on this course please click on the **'Book Course'** button to the right of this page and login or register for a user account to complete your booking(s). Any queries please do not hesitate to contact us via **admin@gta.gg** or call us on 01481 244570.

If no date is scheduled for this course at the present time please click on the **'Register Interest'** button and login or register for a user account so that we can add you to our course interest register. This register allows us to contact our tutors and finalise dates for a course as soon as we have a few people who have expressed their interest, so the more delegates who register their interest, the sooner we can schedule a particular course.

Course Tutor

Angus Kemp

Angus Kemp is a qualified Chartered Accountant and has been involved in tutoring students in the islands for over 25 years. He came to Guernsey in 1985 after having qualified in Glasgow, and has spent time with Coopers & Lybrand and BDO as well as a spell with ICI. In 1995 he established Offshore Training Consortium in Guernsey, which was subsequently acquired by BPP, and in 2002 he founded his accountancy practice, Kemp & Company Limited. He continues to service his own clients and specialises in audit and assurance services, liquidations and general business advice. Angus's extensive academic credentials include MA in economics and Politics, Postgraduate Certificate in Accountancy, and a Masters degree in Education.