

Finance, Trust

STEP Advanced Certificate in Advising the Family Business

Course Details

Price

£1,100.00

Length

Online self-study for 4 months. Next course enrolment from 29 June 2026.

Course Overview

The course explores what differentiates family businesses from other types of clients; provide students with a deeper understanding of the theories and frameworks that are needed to better understand business dynamics and examine common concerns, transitions and difficulties encountered within a family business.

It is recommended that this programme is studied prior to enrolling for the **STEP Advanced Certificate in Family Business**

Governance

This course is designed for all professionals working with a family business looking to expand in their profession and carry out their role more effectively.

Students of this course typically include:

- Lawyers/Solicitors/Attorneys
- Accountants

Flexible learning that works for you

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- Financial Planners
- Trust Managers (Senior)
- Wealth Managers
- Tax Advisors
- Compliance Officers/Managers
- Bankers
- Family Office Executives

Features:

- This course is widely applicable and essential to anyone working with a family business.
- The programme is not jurisdiction or culturally specific – it has been designed to be accessible for all professions across the world, speaking in a common language so that those from different specialisms can collaborate to better serve their family business clients.
- Designed, written and delivered with leading industry experts.
- Successful completion provides 30 Diploma Level credits.

Course Content

Following this course you will be able to:

- Understand the complexities of working with family businesses
- Analyse family business dynamics, governance issues and sources of conflict
- Apply a range of proven tools to help the family business achieve its objectives
- Demonstrate the skills and knowledge expected of a competent family business adviser operating within the bounds of their own profession of origin.

This will in turn enhance family business expertise and capabilities within your firm/department, provide you with access to a wider business and professional community of practice, help you to identify business opportunities in this emerging market and increase credibility with prospective clients.

The course is available for study twice annually with intakes beginning in January and July (and assessments taking place in May and November). The programme is delivered online and will take four months to complete. We recommend that you spend

four to six hours per week on private study for the four months prior to the assessment.

Enrolment onto this course will include the following:

- Access to an online learning platform that contains:
- Interactive e-learning modules comprising a combination of text, videos, podcasts, animations and interactive activities,
- Printable versions of the modules and downloadable resources for delegates to keep following completion of the course,
- Self-assessment questions and summative tasks for each module.

Next enrolment from 29 June 2026

The full course timetable can be found [here](#).

Benefits

The Step Advanced Certificate in Advising the Family Business provides practical knowledge about what differentiates family businesses from other types of clients; introduces theories and frameworks that are needed to better understand family business dynamics, and identify common concerns, transitions and difficulties encountered within a family business.

Prerequisites

Applicants must have obtained 60 STEP Entry-Level credits to enrol onto this course or be a member of STEP. Visit [STEP's Qualification and Membership Framework](#) to understand how to apply.

Assessment

The Advanced Certificate in Advising Family Businesses is assessed by way of an end of course written assignment based on a published case study. The case study will be published two months ahead of the submission date. Candidates will produce a written assignment of between 3,500 and 4,000 words to address the questions contained within the case study. Candidates must achieve 50% in order to pass the Advanced Certificate.

Once you have successfully completed this course you will gain 30 Diploma Level credits towards STEP membership and be awarded the STEP Advanced Certificate in Advising the Family Business.

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 [book online](#).