

Finance, Trust

STEP Advanced Certificate in Cross-Border Estates

Course Details

Price

£1,100.00

Length

Online self-study for 6 months. Next course start date 05 January 2026

Course Overview

This course will explore issues that advisers need to consider when advising clients with a cross-border aspect to their estate, taking examples from common law, civil law, Shariah law and hybrid jurisdictions.

This course has been designed for all professionals dealing with wills, succession and probate in relation to cross-border estates.

Students of this course typically include:

- Wealth Managers
- Estate Managers
- Solicitors/Lawyers
- Accountants

Flexible learning that works for you

E:admin@gta.gg | T:224570 | W:gta.gg

- Tax Advisors
- Notaries
- Advocates
- Family Business Advisors
- Private Bankers
- Family Office Executives
- Financial Planners
- Trust Officers
- Trustees

Features:

- Gain an understanding of the complex issues involved in dealing with estate administration across multiple jurisdictions and be able to advise clients accordingly.
- Practical examples from a wide range of jurisdictions so that students can see how the knowledge they learn is applied in practice.
- The course is reviewed and updated every year, to include the latest industry changes.
- Ideal for practitioners looking from professional accreditation.
- Access a 40% discount on the cost of purchasing European Cross-Border Estate Planning textbook written by Timothy Lyons (Sweet & Maxwell). Full details of how to take advantage of the discount are included on the online learning platform.
- Designed, written and delivered by leading industry experts.
- Successful completion provides 30 Diploma Level credits.

Course price: £995 (£945 STEP discounted fee).

Course Content

Following this course you will be able to:

- Understand the factors that need to be taken into account when resolving issues of conflict of foreign laws.
- Appreciate the fundamental differences between common law, civil law, Shariah law systems and their respective approaches to succession rights, joint assets, matrimonial property, wills and intestacy.

- Advise on the concepts of habitual residence, domicile and nationality and their application to different scenarios.
- Understand the concept of *renvoi* and its application.
- Advise how particular assets in an estate will devolve under different systems taking into account how property is held, issues of intestacy and the application of any relevant conventions/Reg 650/2012.
- Provide guidance on how marriage and registered partnerships, adoption and surrogacy can affect succession.
- Demonstrate familiarity with a range of succession systems and the interaction between those jurisdictions bound by Regulation 650/2012 and those that are not.
- Advise on the practical application of EU Regulation 650/2012 and the approach taken in jurisdictions not bound by the Regulation.
- Explain the tax regimes adopted in different jurisdictions.
- Describe the effect of any applicable tax treaties on any investments held by the deceased.
- Know how to administer a cross-border estate in practice.

Next enrolment by: 05 January 2026

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

Benefits

The Step Advanced Certificate in Cross-border Estates offers a detailed insight into the different issues that arise when dealing with cross-border estate planning and succession worldwide.

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](#).

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, we 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.

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