Finance, Trust

STEP Advanced Certificate in Cross-Border Estates

Course Details

Price

£1,100.00

Length

Online self-study over a period of 4 months.

Course Overview

Get detailed insight into issues that arise from cross-border estate and succession planning.

The course will explore the issues that advisers need to consider when advising clients with a cross-border aspect to their estate.

- Efficient cross-border estate administration: Learn how to administer a cross-border estate efficiently, encompassing various legal systems and considering issues of property, intestacy, and conventions.
- Cross-jurisdictional expertise: Appreciate fundamental differences between common law, civil law, and Shariah law systems, providing insights into their approaches to succession and family matters.
- Practical application skills: Acquire hands-on knowledge to advise on the practical application of EU Regulation 650/2012 and understand approaches in non-bound jurisdictions.
- Tax regime proficiency: Understand tax regimes across different jurisdictions and their impact on the estate, including the effects of applicable tax treaties on investments.

This Advanced Certificate can be taken as part of the STEP Diploma.

Content

- Factors to consider when resolving issues of conflict of foreign laws
- Differences between common law, civil law and Sharia law systems
- How to apply the concepts of habitual residence, domicile and nationality
- The concept of renvoi and its application
- How assets devolve under different systems, considering intestacy and application of relevant conventions and regulations
- How marriage and registered partnerships, adoption and surrogacy can affect succession
- The tax regimes adopted in different jurisdictions
- The effect of any applicable tax treaties on any investments held by the deceased
- How to administer a cross-border estate in practice

Benefits

- Build valuable connections: Network with like-minded professionals in varied roles and firms from all over the world.
- Industry recognition: Awarded in association with Alliance Manchester Business School, a School of the University of Manchester.

Prerequisites

The course is 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 Planners
- Solicitors/Lawyers
- Accountants
- Tax Advisers

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

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

The course is assessed by way of a 3,500-4,000 word written assignment, based on a case study published two months before submission.

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 Advanced Certificate in Cross-Border Estates | 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.