Finance, Trust

STEP Advanced Certificate in Trustees' Duties: Investment and Management of the Trust Fund

Course Details

Price

£1,950.00

Length

Online self-study over a period of 4 months, plus 4 interactive tutor-led sessions

Course Overview

Develop your understanding of a trustee's duties when investing and managing the trust fund. Achieve a globally recognised benchmark qualification and take a step closer to achieving the STEP Diploma.

This course provides practitioners with the technical knowledge and understanding of a trustee's duties when investing and managing the trust fund.

- Gain in-depth expertise: Improve your technical knowledge of law and best practice relating to the proper management and investment of the trust fund, including the key considerations, evaluations, and duties of a trustee in deciding how and in which asset classes to invest trust property.
- Practical focus: Practical advice and guidance written by practitioners, for practitioners on everyday matters encountered when investing and managing a variety of asset classes.

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

Content

- Trustees' powers and duties when investing and managing the trust fund
- How to establish an appropriate asset allocation to meet the needs of the trust
- How to monitor investment performance and balance risk with anticipated return
- The fundamentals and best practice of asset management when administering the following types of trust assets:
- Cash, including money market securities
- Bonds
- Stocks and shares
- Derivatives (options)
- Collective investment funds
- Structured investment products
- Private equity
- Private operating companies
- Real estate
- Movable chattels

Benefits

- Build valuable connections: Network with like-minded professionals in varied roles and firms from all over the world.
- Industry recognition: Recognised worldwide as the 'gold-standard' benchmark qualification for those working in the international trusts industry by employers, regulators, clients, and professional, and is awarded in association with Alliance Manchester Business School, a School of the University of Manchester.

Prerequisites

The course is designed for all professionals moving into or working in financial services (specifically trusts and corporate services), who wish to develop their understanding and knowledge of this area.

Students of this course typically include:

- trust assistants/officers/administrators
- trust managers (senior)
- trustees/fiduciaries
- corporate administrators
- lawyers/solicitors/attorneys
- wealth managers
- accountants
- tax advisers
- compliance officers/managers
- private bankers
- secretarial/administration
- client relations/marketing/sales
- financial/estate planners

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

A 4-hour final examination (comprising multiple choice and long-answer questions).

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 Trustees' Duties: Investment and Management of the Trust Fund