

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 and virtual classrooms over 4 months. Enrol between: 02 February and 12 March 2026

Course Overview

The course is designed for practitioners involved in international trust administration and management to develop your understanding of a trustee's duties when investing and managing the trust fund. It covers in depth insight into the capital markets, money markets, sophisticated investment funds, private equity, structured products and derivatives to enable you to implement investment advice, analyse and monitor trust investments, and report to the beneficiaries.

This course can be taken as a standalone qualification or as part of the STEP Diploma in International Trust Management.

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:

Flexible learning that works for you

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- Trust Assistants/Officers/Administrators
- Trust Managers (Senior)
- Trustees/Fiduciaries
- Corporate Administrators
- Lawyers/Solicitors/Attorneys
- Wealth Managers
- Accountants
- Tax Advisors
- Compliance Officers/Managers
- Private Bankers
- Secretarial/Administration
- Client Relations/Marketing/Sales
- Financial/Estate Planners

Course Content

Following this course you will be able to:

- Understand the standard of care expected of a trustee when investing and managing the trust fund and be able to comply with it
- Appreciate why it is necessary and how to monitor investment performance
- Identify sources of investment risk and be able to measure and balance risk with anticipated return
- Understand the components of and be able to measure and balance risk with anticipated return
- Understand the components of and be able to establish a suitable and appropriate asset allocation for a trustee
- Comply with a trustee's need for adequate liquidity by investing in cash and on the money markets
- Appreciate the broad investment characteristics of different types of bonds, factors affecting price movements, calculate bond yields and evaluate credit ratings
- Identify the broad investment characteristics of different types of stocks, factors affecting stock prices and how to invest for the maximum return with minimum risk by implementing MPT and CAPM

- Appreciate the broad investment characteristics of collective investment funds, including sophisticated-investor hedge funds and private equity funds
- Identify the broad investment characteristics of structured products and understand how they can be used by a trustee in substitution for a tailor-made portfolio of securities
- Use hedging techniques to reduce risk by acquiring options and derivatives
- Manage real estate and high-value moveable chattels held in trust

The STEP Advanced Certificate in Trustees' Duties: Investment and Management of the Trust Fund forms part of the STEP Diploma in International Trust Management combined with three additional STEP Advanced Certificates.

This course is available for study all year round, with intakes at different points throughout the year (depending on your location). The core programme is delivered through a blend of distance-learning and four virtual workshops as part of a revision-week series delivered online by experts in the field who possess vast amounts of professional experience and practical knowledge. Thanks to the online delivery, you can take this course from anywhere.

It is recommended that you spend four to six hours per week on private study for the duration of this course.

Enrol between: 02 February and 12 March 2026

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

Benefits

The STEP Advanced Certificate in Trustees' Duties: Investment Management of the Trust Fund, forms part of the STEP Diploma in International Trust Management which is recognised worldwide as the benchmark qualification for those working in the international trusts industry.

Features:

- Ideal for practitioners looking for professional accreditation.
- A recognised "gold-standard" professional qualification for those working in the industry, globally recognised by employers, regulators, clients and professionals.
- This course is subject to the rigorous quality assurance procedures of Manchester Business School, a Faculty of the University of Manchester.
- Can be taken as a standalone qualification or as part of the STEP Diploma in International Trust Management.

- Blended delivery, written and taught by practitioners focusing on everyday matters encountered when investing and managing a variety of asset classes
- Provides students with the ability to grow their own professional network, interact with students online from a range of professions, build relationships and share study tips/support as a cohort.

Successful completion of the course will award you with 30 Diploma-Level credits towards STEP membership.

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](#).