

Finance, Trust

# STEP Advanced Certificate in Trusts: Law and Practice (International)

## Course Details

### Price

£1,950.00

### Length

Online self-study and virtual classrooms over 4 months. Next course enrolment between 22 September -

## Course Overview

The course provides a review of the trust concept and the role, powers and duties of a trustee to enable trust practitioners to manage wealth held in trust in a professional and effective manner in compliance with industry best practice.

This 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 Officers/Administrators
- Trust Managers (Senior)
- Trustees/Fiduciaries

**Flexible learning that works for you**

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- 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:

- Explain and advise upon the roles, responsibilities and duties of trustees.
- Appreciate how trust companies can market trust services in a competitive environment.
- Comply with requirement upon being appointed as trustee, including in relation to AML, FATCA and CRS.
- Be able to construe typical provisions of a trust instrument, including dispositive provisions of discretionary, settlor-directed and life interest trust.
- Understand how to exercise a dispositive power to pay or apply income, appoint an absolute interest or upon new trusts and of re-settlement.
- Understand the administrative powers and other provisions that trustees may require to administer the trust, invest and manage the trust fund.
- Appreciate the significance of conflict of laws issues, choice and change of the governing law of the trust.
- Administer a trust that confers dispositive and/or administrative powers upon a protector.
- Discuss, advise on and implement an estate plan by use of a trust, in particular for persons resident and domiciled in a forced heirship jurisdiction.
- Understand how offshore trusts may be used to protect family wealth (from creditors, claimants, litigants, trustees-in-bankruptcy), and how to structure an asset protection trust.

- Administer a purpose trust used for typical functions and to hold certain assets, such as shares in a PTC or employee-benefit plan.
- Understand the characteristics of a foundation, how to register and administer one as a member of its council.

The STEP Advanced Certificate in Trusts: Law and Practice (International) 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.

### **Next enrolment from 02 February 2026**

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

Enrolment onto this course will provide access to an online learning platform that contains:

- Bespoke soft copy course manual
- Supplementary resource material, including over 50 company-related documents
- Self-assessment material
- Distance learning support
- Four days of online tuition
- Examination fees

## **Benefits**

The STEP Advanced Certificate in Trusts: Law and Practice (International), 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 in international trust management from creation, modern usage and administration of trusts.
- 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](#)