

Finance, Trust

STEP Certificate in International Trust Management

Course Details

Price

£1,800.00

CPD Points

7592.00

Length

6 months online learning including four days of virtual classroom training for revision Enrol betwe

Course Overview

The STEP Certificate in International Trust Management covers the most up-to-date developments in the industry, introducing you to the fundamentals of international trusts, trust operations and requirements in a global and local environment.

Course Content

Once you have completed this course you will be able to:

- Provide an overview of the main features of the offshore financial industry.
- Distinguish between legal and equitable ownership rights.
- Comply with a trustee's fiduciary duties.
- Explain the fundamental requirements to create a valid trust.

- Describe the different formalities necessary for transferring various types of property into trust.
- Navigate your way around a standard trust instrument.
- Explain how tax is levied on individuals and companies that are domiciled or deemed resident for tax purposes in an onshore jurisdiction.
- Explain how a trust may become at risk of being set aside as a sham and avoid that situation occurring.
- Explain the uses of offshore companies in managing and protecting privately held assets.
- Detail the basic procedure to incorporate a company.
- Appreciate when and in what circumstances a company may be wound up.
- Explain the position, role and rights of shareholders.
- Highlight the risks that a service provider undertakes in providing directors and the ways to mitigate these.

The course is broken down into the following modules:

- Module 1: Introduction to International Wealth Management
- Module 2: The Evolution of Equity and the Law of Trusts
- Module 3: The Creation of a Valid Trust
- Module 4: Types of Trust and Interests
- Module 5: Modern Uses of Offshore Trusts
- Module 6: The Administration of Trusts
- Module 7: The Offshore Asset-holding Company
- Module 8: Incorporation, Funding and Dissolution of Companies
- Module 9: Shareholders, Directors and other Officers
- Module 10: Offshore Corporate Services

For further information, please click this [link](#)

Next enrolment between: 15 September and 10 November 2025

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

Benefits

This course will give you an understanding of the fundamentals of trust work in an international environment. You will gain an insight into legal and administrative principles and gain an understanding of the role of key documentation. The course can be taken as a standalone qualification or as an introduction to the [STEP Diploma in International Trust Management](#) programme.

This qualification is globally recognised and sought after by employers and professionals throughout international finance centres.

The course is designed for all professionals moving into financial services (specifically trusts and corporate services), at an early stage of their career or an aligned practice area 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 Advisors
- Compliance Officers/Managers
- Bankers
- Secretarial/Administration
- Client Relations/Marketing/Sales
- Financial/Estate Planners

Once you successfully complete this course, you will gain 30 Entry Level credits towards STEP membership and be awarded the STEP Certificate in International Trust Management.

The course is delivered through CLTI's online learning platform along with four days of virtual tuition, taking six months to complete.

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 click [here](#)