Finance, Trust

STEP Professional Postgraduate Diploma in Private Wealth Advice

Course Details

Price

£6,750.00

Length

Online only for 6 months. Next course enrolment: 07 September 2026

Course Overview

The STEP Professional Postgraduate Diploma in Private Wealth Advice is an innovative, masters level qualification developed to assist practitioners operating in a fast-moving environment with the opportunity to explore the most topical and relevant subjects and skills impacting on private practice today. Private wealth management is a globally mobile industry with multigenerational clients and families focused on a holistic service. The demand for practitioners is for those who can demonstrate a wider understanding and breadth of knowledge in their advice.

This course is suitable for both ambitious professionals in the early to mid-stages of their career who aspire to become business leaders and develop their strategic understanding and risk assessment ability, as well as for experienced practitioners and senior leaders looking to widen their business portfolio and expand their client base.

Students of this course typically include:

- Private Client Advisers

- Wealth Managers
- International Tax Advisers
- Private Bankers
- Family Office Executives
- Trust Officers
- Family Business Adviser
- Senior Financial Planners
- Senior Lawyers

Features:

- Innovative and interactive online masterclasses on a range of topical subjects led by recognised industry experts with a wealth of experience to share.
- Enhancement sessions to develop strategic skills in the areas of business strategy, sales and marketing and leadership and judgement delivered by renowned practitioners and speakers.
- Cohort sizes are limited to ensure that all students have the opportunity to participate and interact. Participation is strongly encouraged and facilitated so that students can benefit from colleagues sharing their experiences.
- Alumni from the programme have gone on to develop new business and revenue streams from insights and knowledge gained from the programme.
- Unparalleled networking opportunities with like-minded practitioners, often from a range of professional backgrounds and jurisdictions.
- Participation in masterclasses and subsequent consolidation of what is taught, enhanced by own research completed in preparation of the Reflective Journal and Oral Assessment will have real practical benefit in the workplace.
- Delivered online with two weekend sessions once a month, this programme is idea for time-pressed professionals overseas and globally accessible.
- The highest level qualification in the STEP qualification framework.
- This course is also subject to the rigorous quality assurance procedures of Alliance Manchester Business School (Alliance MBS), a school of the University of Manchester.
- Successful completion fulfils the educational requirement (120 Diploma level credits) for full STEP membership, meaning that graduates are eligible for full STEP membership (subject to having 2 years' experience at a specialist level).
- Accredited by Alliance Manchester Business School.

Course Content

Following this course you will be able to:

- Demonstrate mastery of the knowledge and skills required for senior advisers in the private wealth field.
- Provide your clients with the highest standard of service.
- Network with like-minded senior practitioners from a range of jurisdictions and professions to and increase your professional connections.
- Set yourself apart from other senior practitioners looking to take the next step in their professional career.
- Become a full member of STEP and use the TEP designation.

The programme runs over six months and will be delivered fully online through a blend of self-study, practical research and attendance at monthly weekend sessions. Please note that to cover the maximum number of students worldwide all masterclasses commence at 9am UK time.

The programme consists of eight masterclass sessions led by industry experts focussing on emerging specialist areas of practice which are providing disruptive opportunities for business growth and transformation:

- Strategic Risk Management for Leaders
- Family Business Advising
- Trust Disputes
- Cross-Border Succession
- Strategic Philanthropy
- Digital Assets
- Compliance for Trustees
- International Tax

To compliment the technical learning, students are invited to join enhancement sessions for aspiring senior and strategic leaders to enhance their leadership and commercial skills:

- Sales and Marketing Considerations
- Leadership and Judgement

Upon registration students are given access to an online learning platform, which contains bespoke course reading and workbooks for the eight masterclass topics, further reading (in the form of the STEP Diploma in Trusts and Estates and the

STEP Diploma in International Trust Management course manuals) and a range of additional resources. Students will also receive access to a discussion forum to facilitate networking.

Next enrolment by: 07 September 2026

The full course timetable can be found here.

Benefits

The STEP Professional Postgraduate Diploma in Private Wealth Advice is an executive programme for experienced practitioners in the wealth management field looking to develop their understanding of critical thinking, risk assessment and business strategy and wanting to take the next step in their professional career.

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**.

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, we 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.