STEP ADVANCED CERTIFICATE IN TRUST DISPUTES

ANTICIPATING AND AVOIDING THE PITFALLS IN TRUST CREATION AND ADMINISTRATION

Gain 30 Diploma Level credits

Find out more at one of our open evenings www.step.org/openevenings
If you are involved in the creation and administration of trusts, the STEP Advanced Certificate in Trust Disputes equips you with the expertise needed to anticipate, and consequently avoid, the common pitfalls that can lead to trust litigation.

As the risk of trustees becoming involved in court proceedings is on the rise, the STEP Advanced Certificate in Trust Disputes provides you with detailed knowledge of the specific issues that can lead to trust disputes. Designed for delegates based anywhere in the world, this course is expertly delivered through our online learning platform. The course gives you an extensive overview of various permutations involved in trust disputes. Although the course material focuses on English law and practice, it draws on case law from other leading trust jurisdictions and candidates can use the law of the jurisdiction they reside and work in for their assignment.

Suitable for anyone involved in the creation and administration of trusts, including trust officers, private client lawyers, those involved in pension trusts, relationship managers, contentious lawyers who act for trustees or beneficiaries, lawyers who advise trustees’ professional indemnity insurers, directors and CRMs, this course enhances your understanding of how disputes occur and how they can be avoided.

The course content has been written by Toby Graham TEP, a leading trusts litigator who is a partner and Head of the specialist Contentious Trusts and Estates Group at Farrer & Co in London. Toby has extensive experience of trust and estates disputes both in England and offshore jurisdictions.

**KEY LEARNING OUTCOMES**

On completing the Advanced Certificate you will be able to:

- Describe the recurrent themes and key principles that often arise in trust disputes and anticipate the different causes of trust disputes
- Identify appropriate measures to protect the interests of relevant parties threatened by a looming trust dispute
- Identify appropriate action to prevent trust litigation from unfolding
- Explain how to protect the interests of relevant parties after litigation has commenced
- Understand the litigation process including the issues to consider in cross-border litigation
- Identify the potential risks involved in the creation and administration of trusts and how to manage those risks

“This STEP Advanced Certificate is an outstanding Certificate for those of us practicing in the Trust industry. I encourage every practitioner, particularly Trust Officers, to take the course as it is very well structured.”

**Pedro Raul Parra**, President & CEO, Mercantil Commercebank, Trust Company
Delivered entirely online, this distance-learning course takes four months to complete.

Candidates have access to a range of comprehensive resources through our online learning platform, which includes:

- Soft copy course materials, including the course manual, allowing you to study at your own convenience
- Pre-recorded webinars
- Self-assessment material for each module, including multiple-choice questions and quizzes
- Podcasts on topics such as validity issues in relation to trusts, sham trusts, and beneficiaries’ rights to information

This course is assessed through a 3,500 word assignment based on a case study. Candidates can use the law of the jurisdiction they reside and work in for their assignment.

There are two sittings a year for this Advanced Certificate taking place in May and November.

The course covers the following modules:

- Sham trusts
- Defective trusts
- Trustee powers
- Investment disputes
- Corporate issues relating to trusts
- Consequences of a breach of trust
- Trustee defences
- Variation of trusts, Public Trustee and other such applications
- Construction, rectification and mistake
- Claims in negligence in relation to the creation or administration of a trust
- Disclosure issues
- Disputes involving protectors
- Transfer of trusteeship in contentious cases
- Costs
- Conflicts of law and other jurisdictional issues
- Trusts in the context of divorce proceedings

Completing the Advanced Certificate will enable you to:

- Anticipate and avoid the pitfalls leading to dispute situations
- Protect yourself and your clients before the commencement of litigation
- Manage any dispute situation to your and your client’s advantage
- Demonstrate expertise in the area and commitment to client service

Enrol online at www.step.org/ADcertTD
WE ARE STEP

STEP is the worldwide professional association for those advising families across generations. Full Members of STEP (TEPs) are the most experienced and senior practitioners in the field of trusts and estates. STEP membership is considered a mark of excellence and our high professional standards are recognised internationally.

Our members have a broad range of professional backgrounds, and include accountants, lawyers, trust specialists and other similar practitioners who work in trusts and estates.

Once you are a member of STEP you can connect and network with other members across a range of specialisms around the world.

There are three routes to membership, depending on your level of experience and qualifications: Exam, Essay, and Expertise. Select the route that is most appropriate for you, and become an Affiliate, Associate or Full Member (TEP).

Find out more at www.step.org/join

CLT INTERNATIONAL

CLT International (part of Wilmington plc) is STEP’s primary education partner, providing certificated training and qualifications for STEP members worldwide.

COST

The fee for this course is
• £695 + UK VAT (if applicable)
• Full Members of STEP receive a discounted rate of £645 + UK VAT (if applicable)

The fee is fully inclusive of all learning resources, distance-learning support and assessment fees.

Note: The STEP Advanced Certificate in Trust Disputes is listed on the Singapore Financial Training Scheme Programme Directory therefore participants may be eligible for 50% funding of the course fee. The funding is available upon completion of the Advanced Certificate. More information can be found at www.mas.gov.sg.

For all enquiries about eligibility and to make an application, please contact the IBF at funding@ibf.org.sg

Please note:
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