

STEP PROFESSIONAL POSTGRADUATE DIPLOMA IN PRIVATE WEALTH ADVISING

AN ADVANCED-LEVEL PROGRAMME DESIGNED
FOR SENIOR INDUSTRY PRACTITIONERS

**A route to Full
STEP Membership**

As the global economic environment is constantly evolving and the needs of clients are becoming more complex, practitioners working in the private wealth field need to excel as never before.

The STEP Professional Postgraduate Diploma in Private Wealth Advising is designed to enhance and build on your knowledge, skills and ability whilst giving you the opportunity to showcase your existing skillset. This programme also broadens your understanding of critical thinking, risk assessment and business strategy. Once you complete this course, you will gain a first-class, specialist qualification and have the expertise needed to take your career to the next level.

ENTRY ADVICE

This specialist programme will be of interest to:

- Private Client Advisors
- Wealth Managers
- International Tax Advisors
- Private Bankers
- Family Office Executives,
- Trust Officers
- Family Business Advisors
- Senior Financial Planners
- Senior Lawyers

In order to be eligible for this programme, you will be required to have:

- a relevant first degree-level qualification, and currently be working in a senior practitioner role with at least three years' experience in that role or at the equivalent level of seniority; or
- a STEP Diploma and at least five years' experience in a related discipline, and currently be working in a role that includes senior level responsibilities and regular engagement with senior practitioners; or
- a relevant professional qualification or relevant vocational degree and five years' industry experience; or
- at least 10 years' experience in a relevant senior management role (see website for criteria).

KEY BUSINESS OUTCOMES

You will be taught at an appropriately advanced level reflecting your position within your firm. On successful completion of the course you will have:

- Expanded your knowledge beyond the practitioner level to high level strategic thinking
- Identified new or developing opportunities and markets for your firm's business
- Rigorously considered your firms strengths (and weaknesses) in the highly competitive area of private wealth management, making improvements and/or mitigating risk
- Met, engaged and explored new and challenging concepts with a group of like-minded and similarly senior and experienced practitioners from around the globe and expanded your professional network

Register now at www.step.org/ppgd

KEY LEARNING OUTCOMES

Specifically designed for senior industry practitioners and experienced TEPs in different areas of practice both domestically and internationally, this advanced programme will enable you to:

- Demonstrate mastery of the knowledge and skills required for senior advisors in the private wealth field
- Provide your clients with the highest standard of service
- Network with like-minded senior practitioners and increase your professional connections
- Set yourself apart from other senior practitioners
- Become a Full Member of STEP and use the TEP designation

**The
masterclasses
take place at the
world-renowned
University of
Oxford in the UK**

COURSE STRUCTURE AND ASSESSMENT

This level 7 qualification takes nine months to complete and is delivered through a blend of self-study, research and attendance at eight masterclass sessions. The masterclasses are led by industry experts over a period of two condensed residential weekends at the world-renowned University of Oxford in the UK.

The assessment for this course consists of:

- Submission of a reflective journal made up of eight 1,000–1,500 word masterclass commentaries;
- A three-hour, face-to-face interview

Masterclass topics:

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

**The Professional Postgraduate
Diploma has been accredited with
90 Masters Level credits by the
University of Law towards an MSc
in Private Wealth Advising**

To discover more about the masterclasses, visit
www.step.org/ppgd

COST AND HOW TO APPLY

The fee for this programme is £5,550 (+ UK VAT if applicable), which includes:

- Access to an online learning platform, which contains all course materials including recorded webinars
- Attendance at two residential weekend teaching sessions
- Overnight accommodation and meals for all tuition days, including private dining evenings
- Assessment and certification

Enrol online at www.step.org/ppgd

As part of the enrolment process, you will need to complete a course enrolment form and provide the following supporting documents:

- An up-to-date CV
- A job profile, which includes details of your current position
- A company organisational chart

If you do not have a current job profile or organisational chart, you will need to submit a summary of your job role and position within your company for your current or last job.

Due to the level of the course, a restricted number of places are available.

WE ARE STEP

STEP is the worldwide professional association for those advising families across generations.

Full Members of STEP (TEPs) are among 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, including accountants, lawyers, trust specialists and other similar practitioners who work in trusts and estates.

Once you are a member of STEP you will join a network with other members across a range of specialisms around the world.

CLT INTERNATIONAL

CLT International is the course provider for the Professional Postgraduate Diploma, STEP Certificates, the STEP Diploma in International Trust Management and regional STEP Diploma and Advanced Certificate programmes across the globe.

CLT International has a wealth of experience in providing high quality, certificated, professional training programmes to delegates around the world.

For questions on qualifications email cltinternational@centlaw.com

Please note:

Every effort has been taken to ensure that this publication was accurate at the time of going to press but STEP and CLT International are not liable for any errors or omissions in this publication. STEP and CLT International reserve the right to vary or cancel a course or examination where the occasion necessitates. STEP and CLT International accept no liability if, for whatever reason, the course or examination does not take place.