

STEP Diploma in Trusts and Estates (Scotland) May 2018 Examinations

Diploma	Centre	Course Enrolment Opening Date	Course Enrolment Closing Date	Workshop 1	Workshop 2	Exam/resit Date
Wills and Executries: Law and Practice	Glasgow	28 July 2017	12 January 2018	6 March 2018	N/A	N/A
	Edinburgh	28 July 2017	12 January 2018	N/A	17 April 2018	17 May 2018 (am)
Trusts: Law and Practice	Glasgow	28 July 2017	12 January 2018	7 March 2018	N/A	N/A
	Edinburgh	28 July 2017	12 January 2018	N/A	18 April 2018	18 May 2018 (am)
Taxation of Trusts & Estates	Glasgow	28 July 2017	12 January 2018	29 March	N/A	N/A
	Edinburgh	28 July 2017	12 January 2018	N/A	9 May	6 July 2018 (pm)
Trust & Executry Accounting	Glasgow	28 July 2017	12 January 2018	9 March 2018	N/A	N/A
	Edinburgh	28 July 2017	12 January 2018	N/A	20 April 2018	18 May 2018 (pm)

Tax Computation Day (optional)	Centre	Enrolment opening date	Enrolment closing date	Date of session
	TBC	28 July 2018	25 May 2018	14 th June

Taxation of Trusts and Estates:

We are moving to an annual rather than bi-annual cycle for the Taxation course, with the first Workshops taking place at the end of March, the second Workshops taking place at the end of April and the Computation Days at the end of May. The examination will take place early-July. The benefit of this is that the course material will be updated on an annual basis only, at a logical time (the process of updating beginning after the publication of the Finance Act) and as of 2019 the aim is that material will be finalised further in advance of the teaching days and examinations. An examination without the preceding teaching days will also take place in November, primarily for those who are re-sitting.

The course material for the July 2018 examination sitting is currently being updated and will be available at the end of February. Dates for the Workshops, Computation Days and examination for the July 2018 sitting will be available here shortly.

Taxation Computation Day

This optional day of tuition is aimed at those studying towards the Taxation of Trusts and Estates examination who would like additional help with the computational aspect of the course. The computation day involves working through in detail the step-by-step approach that needs to be undertaken in relation to tax computations.

Cancellation of workshops

On occasion there are insufficient enrolments for planned workshops to go ahead. Delegates will be notified of the cancellation of a workshop (and offered attendance at an alternative centre) as soon as possible. For the first workshops this is once course enrolment has closed. For the second workshops this is after the first workshops have taken place (sometimes enrolments for second workshops are boosted by delegates from previous sittings re-joining the course). It is strongly recommended that non-refundable travel/accommodation expenses are not paid for in advance without checking with the CLTI office the likelihood of the workshop in question going ahead. Travel/accommodation expenses incurred in relation to cancelled workshops will not be reimbursed.

