

## STEP Professional Postgraduate Diploma in Private Wealth Advice

**Welcome & Getting Started – 1 December 2023 @ 13:30-15:00**

<b>9- 10 December 2023</b>	
<b>Masterclass 1:</b> <b>Strategic Risk Management for Leaders</b>	Saturday 09:00 - 13:00 (UK time)
<b>Masterclass 2:</b> <b>Family Business Advising</b>	Sunday 09:00 - 13:00 (UK time)

<b>13 – 14 January 2024</b>	
<b>Masterclass 3:</b> <b>Trust Disputes</b>	Saturday 09:00 - 13:00 (UK time)
<b>Masterclass 4:</b> <b>Digital Assets</b>	Sunday 09:00 - 13:00 (UK time)

**Reflective Journal Draft Submission – 5 February 2024**

<b>17 – 18 February 2024</b>	
<b>Masterclass 5:</b> <b>International Taxation &amp; Information Exchange</b>	Saturday 09:00 - 13:00 (UK time)
<b>Masterclass 6:</b> <b>Strategic Philanthropy</b>	Sunday 09:00 - 13:00 (UK time)

**Assessment Preparation Virtual Classroom – 5 March 2024 @ 14:30-16:00**

<b>16 – 17 March 2024</b>	
<b>Masterclass 7:</b> <b>Compliance for Trustees</b>	Saturday 09:00 - 13:00 (UK time)
<b>Masterclass 8:</b> <b>Cross-Border Succession</b>	Sunday 09:00-13:00 (UK time)

### **Leadership and Strategy Enhancement Sessions**

<b>13 – 14 April 2024</b>	
<b>Sales and Marketing</b>	Saturday 09:00 - 11:30 (UK time)
<b>Leadership and Judgement</b>	Sunday 09:00 - 11:30 (UK time)

### **Assessment**

#### **Reflective Journal – Due 8 April 2024**

1,000 – 1,500 words commentary per masterclass to include notes on the case study outcomes

**Oral Assessment** – Taking place weeks commencing 13-24 May 2024

**Results will be released on 14 June 2024**