

STEP Trust Fundamentals Masterclass

A full-day virtual training for
early-career professionals

Build confidence

Strengthen capability

Reduce onboarding time



Junior team members are expected to contribute fast, but few arrive with solid grounding in trust fundamentals. This full-day, expert-led virtual masterclass closes that gap.

Trust law fundamentals

Core terminology and principles, explained clearly.

Real-world application

Different trust types, and the roles and responsibilities behind them.

The trust lifecycle

From set-up to administration, plus common risks and compliance considerations.

Practical, case-based learning

Apply what you learn through real scenarios and discussion.



Who it's for

- Trainee Trust Officers
- Junior Paralegals
- Trust Administrators
- Graduate Scheme Participants
- Newly hired Private Client Associates
- Legal, tax & compliance colleagues working with trusts

Delivered live either to your firm's own dedicated cohort (minimum 10 learners) or through our public cohort (minimum 2 learners). Individual applications may also be considered on request. Suitable for professionals across the firm and wider professional services teams who would benefit from a foundation in trust principles.

Built for the individual. Built for the firm.

Whether you're building your own foundation or upskilling your team, the masterclass works for both.

For learners

- A working understanding of the fundamentals of trust law and key terminology
- The ability to identify different types of trusts and their real-world applications
- Clarity on the roles and responsibilities of trustees and beneficiaries as well as the trust lifecycle
- Recognise common risks and compliance considerations.

For your firm

- Faster onboarding, less supervision burden
- Consistent, foundational knowledge across your team
- Stronger retention of early-career talent
- A practical first step into STEP qualifications
- Flexible cohort pricing to suit your team size.

On completion, you'll get

-  STEP Certificate of Attendance
-  A foundation for STEP qualifications

Why STEP

STEP is the global professional body for trust and estate practitioners, delivering internationally recognised qualifications grounded in current practice.

**Speak to the Corporate Solutions
team about scheduling an cohort for
your teams today**