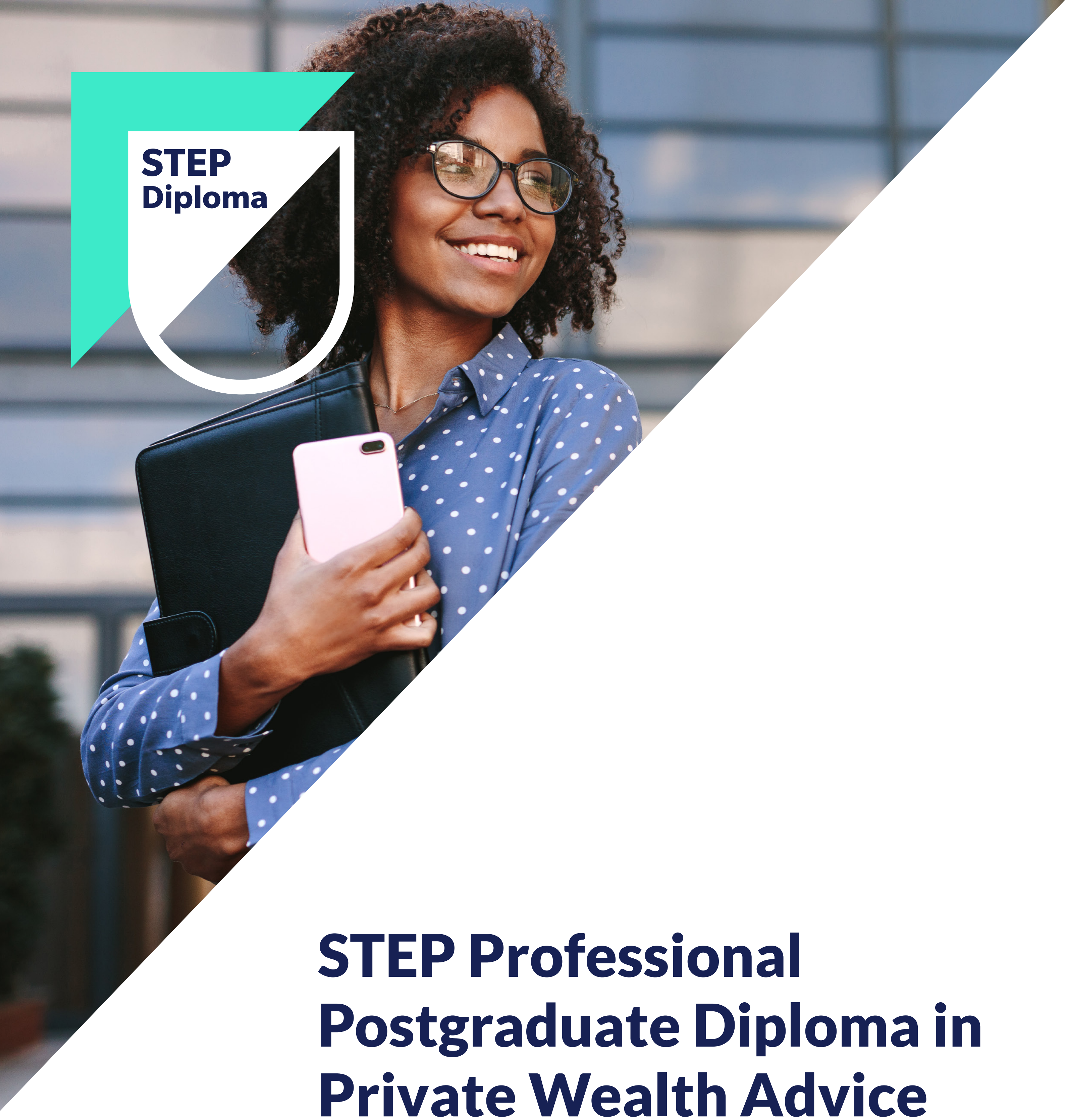

STEP Diploma

STEP Professional Postgraduate Diploma in Private Wealth Advice

STEP
ADVISING FAMILIES ACROSS GENERATIONS

Our education partner
CLTI

Elevate your expertise in wealth management and estate planning with our accredited programme. Gain specialist knowledge and skills to excel in the world of private wealth advising.

The STEP Professional Postgraduate Diploma in Private Wealth Advice, the highest-level qualification in the STEP framework, is an innovative qualification that delivers immediate practical benefit in the workplace.

Today's private wealth management industry is globally mobile, with multi-generational clients who want a comprehensive service. Successful practitioners need advanced knowledge and strategic thinking skills to get ahead.

'I could not recommend the PPGD course and CLTI highly enough. It has been an excellent course all round and well worth the time. A stepping stone to my master's study, it provided me with good background knowledge of regulatory change within estate planning and trusts. The seminars were excellent, and the topics covered were fully comprehensive. The networking was excellent. I am still in touch with people I met on the course.'

Elizabeth Spiess,
Generation Three, Senior Trust and Company Administrator, Switzerland

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Written and delivered by industry experts, the course content is tailored to benefit practitioners working in the fast-moving modern wealth management industry.

An exclusive series of online masterclasses, provided by industry-leading tutors, helps you explore the most topical and relevant subjects and skills impacting on private practice today.

You also have access to unique features such as networking opportunities with like-minded practitioners from a range of professional backgrounds and jurisdictions.

This dynamic, expert-level course provides an unparalleled learning experience to help you excel in the fast-paced world of private wealth advising:

- **expertise that matters with real-world application:** develop valuable leadership, business strategy and critical-thinking skills
- **global perspective:** explore international best practice and trends to help you serve a diverse clientele in a globalised world
- **career advancement:** elevate your career prospects, increase your earning potential and accelerate your effectiveness as a senior leader
- **build connections:** network with like-minded professionals in varied roles and firms from all over the world
- **industry recognition:** join the exclusive but growing community of full STEP members using the 'TEP' designation

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The course is subject to the rigorous quality assurance procedures of Alliance Manchester Business School, a Faculty of the University of Manchester.

In association with

MANCHESTER 1824

The University of Manchester
Alliance Manchester Business School

This course is suitable for:

- private client advisers
- wealth managers
- international tax advisers
- private bankers
- family office executives
- trust officers
- family business advisers
- senior financial planners
- senior lawyers

Masterclasses

All masterclasses take place on Zoom. The sessions have been designed to provide an interactive, innovative learning experience using features such as breakout rooms, polls and whiteboard collaboration.

To maximise your learning, we encourage you to actively participate by engaging with the masterclass leader and your peers.

We expect that you will contribute to the discussions, ask appropriate questions and be visible to your peers with video cameras switched on throughout the sessions. There is a real value in your collaboration and our alumni talk positively of the networks built through the programme.

Students are required to attend all masterclasses to be able to prepare their commentary on each of the eight masterclasses for their reflective journal.

You do not need to be experienced in all areas of the masterclass topics to study for this programme.

Masterclass	
1	Strategic Risk Management for Leaders
2	Family Business Advising
3	Trust Disputes
4	Digital Assets
5	Cross-Border Succession
6	Strategic Philanthropy
7	Compliance for Trustees
8	International Taxation and Information Exchange
9	Two exclusive sessions

Access the full syllabus here

By the end of this masterclass, you will be able to:

- formulate a strategic GRC framework for your firm, division, department or practice area
- evaluate risk and examine the scope of de-risking within the wealth adviser sector at macro and micro levels
- provide a detailed analysis of the strategic risks within your firm
- explain your firm's appetite for risk
- appraise and classify the conduct risks that confront your firm

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Entry requirements

To join the STEP Professional Postgraduate Diploma in Private Wealth Advice, applicants must:

- Be a member of STEP at Affiliate level or higher, or have a relevant professional qualification at level 6 or higher or relevant vocational degree, and
- Have at least five years industry experience.

If you do not meet these criteria, we recommend completing the STEP Diploma first or contacting our team to discuss your individual circumstances and suitability to study at this level.

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Becoming a 'TEP' member with the Postgraduate Diploma in Private Wealth Advice

STEP membership helps elevate your career, raising your profile locally and globally, helping you stay on top of industry changes and giving you an international passport to new business opportunities.

By completing the STEP Postgraduate Diploma in Private Wealth Advice, you will achieve full STEP member status, known as 'TEP' (Trust and Estate Practitioner), and will be able to use the designation, an internationally recognised designation denoting experience and expertise. You will also have the use of the STEP logo on web and email signatures as well as a **whole host of other benefits.**

On successful completion, you will be eligible to upgrade to Full (TEP) membership, providing you have a minimum of two years' current experience in an area related to STEP.

If you are not currently a member of STEP you can find out more about member benefits here

Enrol now

Preparing for the course

After you have registered you will be able to access an online platform with tailored pre-reading and supporting documents for eight masterclass topics, including additional resources and readings from STEP Diplomas. Completing pre-reading two weeks before each session is important for successful participation.

STEP Diploma course manuals offer background reading. Available throughout the programme, they provide an in-depth understanding for those interested in specific areas.

Before starting, consider personal and professional objectives for the course. Reflect on career goals, skills development and network expansion, and share objectives with the Learner Support team privately via the online portal.

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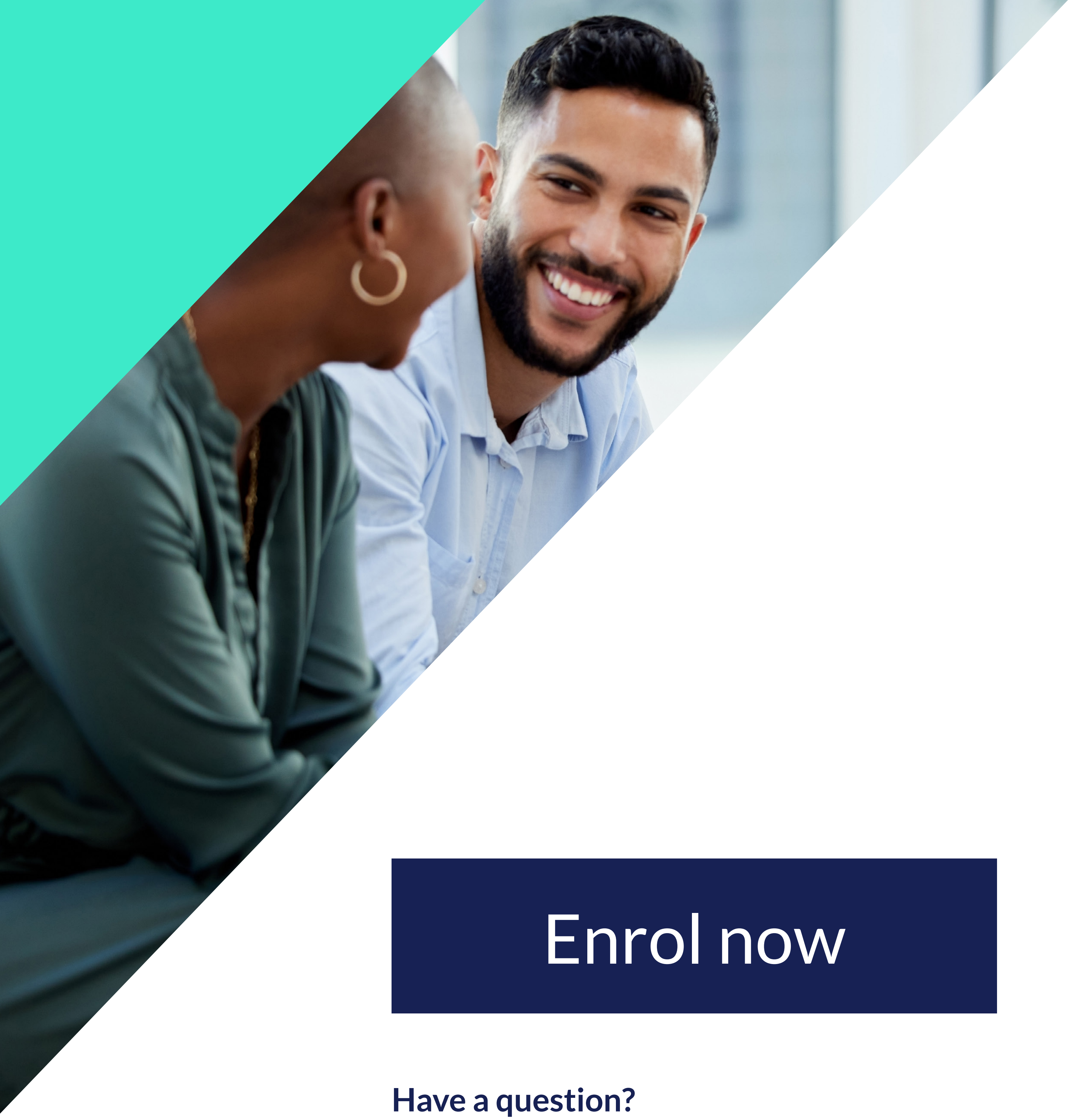

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Have a question?
Our Enrolment Support team will be happy to help with any queries. Please call us on +44 (0) 121 362 7733 or complete the Contact Us form.

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