



STEP ADVANCED CERTIFICATE IN ADVISING VULNERABLE CLIENTS - ENGLAND & WALES

FOR PROFESSIONALS ADVISING
THOSE WITH ISSUES OF MENTAL
AND PHYSICAL INCAPACITY

Gain 60 Diploma Level credits

The STEP Advanced Certificate in Advising Vulnerable Clients is designed to bring together all the disparate knowledge qualified professionals need, **to offer a high quality service** to vulnerable clients and their families, focusing on the law in England and Wales.

This two-part course has been created by leading experts Caroline Bielanska TEP, Clive Barwell TEP FCSI CFP, Patricia Wass TEP and Julia Abrey TEP for individual specialists as well as practices dealing with elderly and vulnerable clients.

The programme represents the first comprehensive mapping of legislative, welfare, financial and practice issues surrounding the care and advice provided to vulnerable people in England and Wales whilst covering end-of-life issues, including the high profile and publicly debated topic of assisted suicide. This course will also address recent and topical legislation in this area.

Completing this course will enable you to improve professional efficiencies, manage risk in a highly complex service area, develop business opportunities and offer a specialist service; differentiating what you can offer from other providers.

You will also be able to develop your skills and knowledge through interactive case studies during the workshops. Graduates will be able to maintain their knowledge and support their CPD through access to an online resource portal and community of practice.

To gain the STEP Advanced Certificate in Advising Vulnerable Clients, both parts of the programme must be taken and the assessment following Part Two must be passed.

BUSINESS OUTCOMES

Completing this Advanced Certificate will enable you and your organisation to:

- Offer a specialist service differentiating you from other providers
- Streamline your processes to improve professional efficiencies
- Manage risk in a highly complex service area
- Develop business opportunities in a growing market

“Excellent – just what I was expecting and extremely well delivered”

Tessa Whiskard TEP, Partner, Jobling Gowler LLP

Enrol online at www.step.org/ADcertAVC

KEY LEARNING OUTCOMES

Part One – The Knowledge Framework

As a result of successfully completing Part One of the course you will be able to:

1. Comply with current best practice and professional standards
2. Demonstrate a thorough understanding of the mental capacity legal landscape
3. Assess the mental capacity of a client for different transactions
4. Assist clients with international aspects to their estates
5. Reduce the risk of disputes and overcome problems when planning ahead
6. Advise those making decisions on behalf of a person who lacks mental capacity
7. Advise clients and their families on end-of-life concerns

Part Two – The Practical Framework

As a result of successfully completing Part Two of the course you will be able to:

1. Make various court applications with confidence
2. Draft trusts for vulnerable people
3. Seek state support and challenge the provision of state support
4. Advise on the sustainability of care
5. Manage disputes and difficult situations

60

**Diploma Level
credits gained on
completion**

Visit step.org/credits

COURSE STRUCTURE AND ASSESSMENT

Part One – The Knowledge Framework

This part includes the following modules:

- Professional conduct
- Capacity legislation, including international elements
- Working for vulnerable clients, including descriptions of vulnerability and understanding different faiths
- Adults with mental capacity, including powers of attorney, advance decisions, gifts and deathbed planning
- Adults without mental capacity, including making financial, health and welfare decisions

Part Two – The Practical Framework

This part includes the following modules:

- Processes, including instructing experts, drafting Court of Protection applications, drafting trusts, and identifying care home contract problems
- How to obtain state support from the NHS, Social Services and the DWP
- How to overcome tricky situations, including challenging local authorities and the NHS, objecting to the registration of an LPA or EPA, dealing with safeguarding concerns and challenging families

COSTS

The course is set at Diploma Level and is appropriate for TEPs, solicitors, barristers, accountants, financial planners and any other professionals who work with vulnerable clients and require a thorough understanding of the legal and practice framework encompassing issues of mental and physical incapacity.

Each part of the Advanced Certificate costs:

£1,950 + UK VAT (if applicable)

Book both parts together for:

£3,705 + UK VAT (if applicable)

Discounts available for Full STEP Members

WE ARE STEP

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

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

Once you are a member of STEP you can connect and network with other members across a range of specialisms around the world.

There are three routes to membership, depending on your level of experience and qualifications: Exam, Essay, and Expertise. Select the route that is most appropriate for you, and become an Affiliate, Associate or Full Member (TEP).

Find out more at
www.step.org/join

CLT INTERNATIONAL

CLT International (part of Wilmington plc) is STEP's primary education partner, providing certificated training and qualifications for STEP members worldwide.

To enrol visit
www.step.org/ADcertAVC

For questions on qualifications please contact
pd@step.org

Please note:

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