

STEP CERTIFICATE IN INTERNATIONAL TRUST MANAGEMENT

A GLOBALLY RECOGNISED INTERNATIONAL
TRUST MANAGEMENT QUALIFICATION

Gain 30 Entry Level credits



In association with



www.step.org/IntCert



The Certificate in International Trust Management is subject to the rigorous quality assurance procedures of **Alliance Manchester Business School (Alliance MBS)**, a school of the University of Manchester.

This STEP Certificate provides a solid grounding in international trust practice from a global and local perspective.

This Certificate will:

- Enhance your knowledge of all aspects of the international trust profession including the vehicles, legal structures, principles and practices underpinning it
- Provide an overview of the legislation, principles and practice in your local jurisdiction
- Enhance your career with a qualification that is recognised by those working in the trust industry



COURSE STRUCTURE AND ASSESSMENT

The programme combines both self-study and online tuition, taking four months to complete.

At the end of the distance learning period, students attend four days of online tuition. This culminates in the final examination on day five. The Certificate is assessed by way of a five-hour, open-book examination.

The examination comprises a mix of multiple choice questions and essay/scenario based questions.

“The STEP qualification really motivates the individuals who study for it. You can see them mature as employees, becoming more confident and knowledgeable, which in turn benefits the clients. What benefits the clients will ultimately benefit the company as a whole.”

Pearline McIntosh, ACIB TEP,
Vice President Trust Services, Butterfield Trust (Bermuda) Limited.

KEY LEARNING OUTCOMES

On successful completion of the Certificate, you will be able to:

- Provide an overview of the main features of the offshore financial industry
- Distinguish between legal and equitable ownership rights
- Comply with a trustee's fiduciary duties and duty of care
- Explain the fundamental requirements to create a valid trust
- Describe the different formalities necessary for transferring various types of property into trust
- Navigate your way around a standard trust instrument
- Explain how tax is imposed on individuals and companies that are domiciled or deemed resident for tax purposes in an onshore jurisdiction
- Explain how an inter vivos trust can be used for estate planning purposes to plan who gets what upon an individual's death
- Create and maintain trust files to record and retain information in a logical, clear and efficient manner
- Explain how a trust may become at risk of being set aside as a sham and avoid that situation occurring
- Explain the uses of offshore companies in managing and protecting privately held assets
- Detail the basic procedure to incorporate a company
- Appreciate when and in what circumstances a company may be wound up
- Explain the position, role and rights of shareholders
- Highlight the risks that a service provider undertakes in providing directors and the ways to mitigate these

BUSINESS OUTCOMES

- Enables you to provide a professional service of a higher standard
- Enhances your ability to give holistic advice to clients as a trusted advisor
- Distinguishes you and your firm from the competition

Enrol online at www.step.org/IntCert

COSTS

This Certificate is an open-entry programme. However, you should have a good standard of literacy and be aware that the programme is delivered in English.

The fee for this Certificate is:

- £1,575 (+ UK VAT at 20%, if applicable)

This fee includes:

- Course manual
- Self-assessment material (including online resources)
- Four days of online tuition
- Examination entry
- Assessment fees

Because the course is delivered online in various time zones, students may attend conveniently from across the globe.

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/IntCert

For questions on qualifications please contact
pd@step.org

Please note:

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