

Further your legal career with S.T.E.P (the Society for Trust & Estate Practitioners)

STEP is the global professional association for practitioners who specialise in family inheritance and succession planning. Working to improve public understanding of the issues families face in this area and promote education and high professional standards among our members.

STEP members help families plan for their futures, from drafting a Will to advising on issues concerning international families, protection of the vulnerable, family businesses and philanthropic giving. Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience.

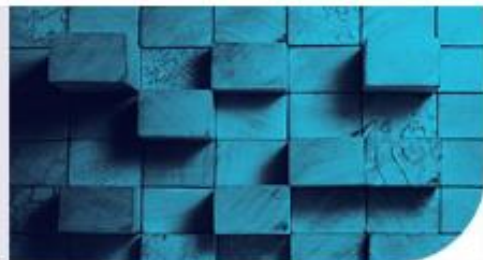
Training and development

We offer a number of qualifications, from entry-level programmes to advanced certificates and diplomas. These qualifications are supplemented by resources that provide continuing professional development and opportunities for sharing knowledge.

Countrywide Tax & Trust Corporation support the following qualifications:

Certificates

STEP Certificates are designed to be introductions to estate planning and wealth management. If you would like to go beyond the introductory level and become a STEP Affiliate, please see the Qualifications and Membership Framework.



Course content and delivery

What does this qualification cover?

- The English legal system
- Introduction to trusts
- Wills, probate and administration
- Introduction to trust and estate accounts
- Introduction to Trust and Estate Taxation

Downloads

- [Brochure](#) (PDF 918KB)
- [Syllabus](#) (PDF 200KB)

How is it delivered?

It is delivered through a blend of distance-learning and face-to-face workshops.

Who would it be useful for?

The range of practitioners currently taking STEP certificate and diploma courses includes members of the accountancy, banking, legal and trust professions (at all levels); charity specialists; a wide range of support staff and paralegals; tax advisors; independent financial advisors and executorship administrators.

How will this course benefit me?

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

- Describe the classification and types of trusts, their uses, what affects their validity, their premature cessation and under what circumstances they can and cannot be altered;
- Understand and interpret the legal language used in trust deeds;
- Describe the roles, responsibilities, limitations and liabilities of trustees;
- Explain the legal formalities involved in the preparation of a valid will and be alert to potential problems;
- Understand the management of the client estate, including probate and intestacy issues, evaluation of any risks involved, deeds of variation, disclaimer and insolvency;
- Describe the roles, responsibilities, limitations and liabilities of executors;
- Summarise the taxes that relate to trusts and estates;
- Prepare and interpret the trust and client estate accounts.

How will this benefit my employer?

Completing this course will equip your organisation to:

- Provide an enhanced professional service to clients;
- Ensure trust, probate and estate administration services are marketed appropriately;
- Meet best practice in trust and estate administration;
- Raise the level of knowledge and understanding of staff;
- Further safeguard the reputation of your organisation.

Completion of this certificate will earn you 30 credits. As part of the new STEP Qualifications and Membership Framework, applicants can use these credits towards the 60 entry level credits required to reach Affiliate member level. Entry level credits can also be gained through the standard application process.

STEP DIPLOMA IN TRUSTS AND ESTATES (ENGLAND AND WALES)



STEP Diploma in Trusts and Estates – England and Wales

You can find full details of the course learning objectives and outcomes in this [brochure](#). This Diploma is comprised of the following four Advanced Certificates and you can find details of course dates, delivery, costs and the syllabus on the individual course pages:

- [Advanced Certificate in Administration of Estates \(E&W\)](#)
- [Advanced Certificate in Administration of Trusts \(E&W\)](#)
- [Advanced Certificate in Taxation of Trusts and Estates \(E&W\)](#)
- [Advanced Certificate in Trust and Estate Accounting \(E&W\)](#)

The [Entry Level Certificate in Trusts and Estates - England & Wales](#) is useful for ensuring you have the basic knowledge to support your Diploma Level studies. Exemption is also possible from a maximum of two Diploma papers, depending upon prior qualifications. Please see the [Qualifications and Membership Framework](#) for more details

For full details of what each qualification covers please go to <https://www.step.org/qualifications/diplomas>

Professional standards

All of our members are subject to an extensive Code of Professional Conduct requiring them at all times to act with integrity and in a manner that inspires the confidence, respect and trust of their clients and of the wider community. Our members are also required to keep up to date with the latest legal, technical and regulatory developments. You can recognise a Full Member of STEP by the letters 'TEP' (Trusts and Estates Practitioner) after their name.

Qualifications & Membership Framework

The Qualifications & Membership Framework (QMF) is STEP's system for assigning credit values to qualifications. It harmonises entry requirements around the world and allows those applying for STEP membership to have their prior qualifications and experience formally recognised through Accreditation of Prior Learning (APL). This comes in the form of:

- Accredited Prior Certificated Learning (APCL)
- Accredited Prior Experiential Learning (APEL)

How does it work?

The interactive diagram below describes the progression, clockwise, through four levels of STEP membership:

- Student
- Affiliate
- Associate
- Full

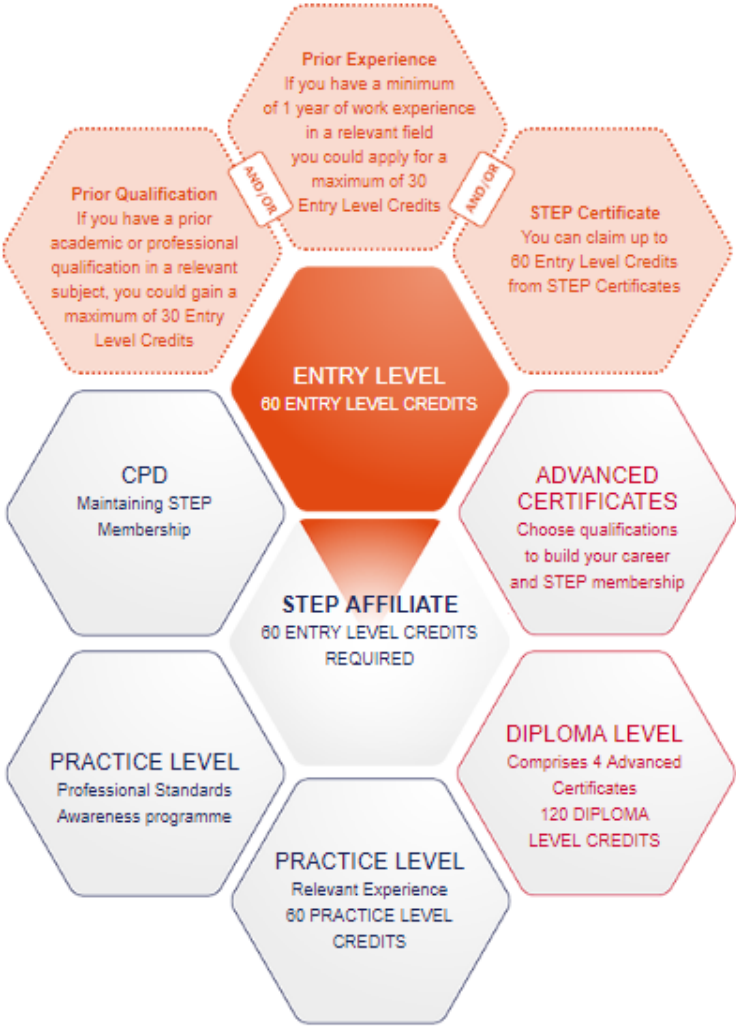
Applicants begin the process by enrolling at Entry Level. Applicants need 60 credits at Entry Level to gain affiliate membership and progress to Diploma Level courses. Some will be able to earn the full 60 credits through APL (see Guidance Notes below) and others will need to complete a combination of STEP certificates.

Existing members will be credited automatically and can enrol on Diploma Level courses immediately.

Reaching full membership requires two years of experience, including significant involvement at a specialist level with one or more of the following: planning, creation, management of and accounting for trusts and estates, executorship administration and related taxes.



Entry Level



Advanced Certificates





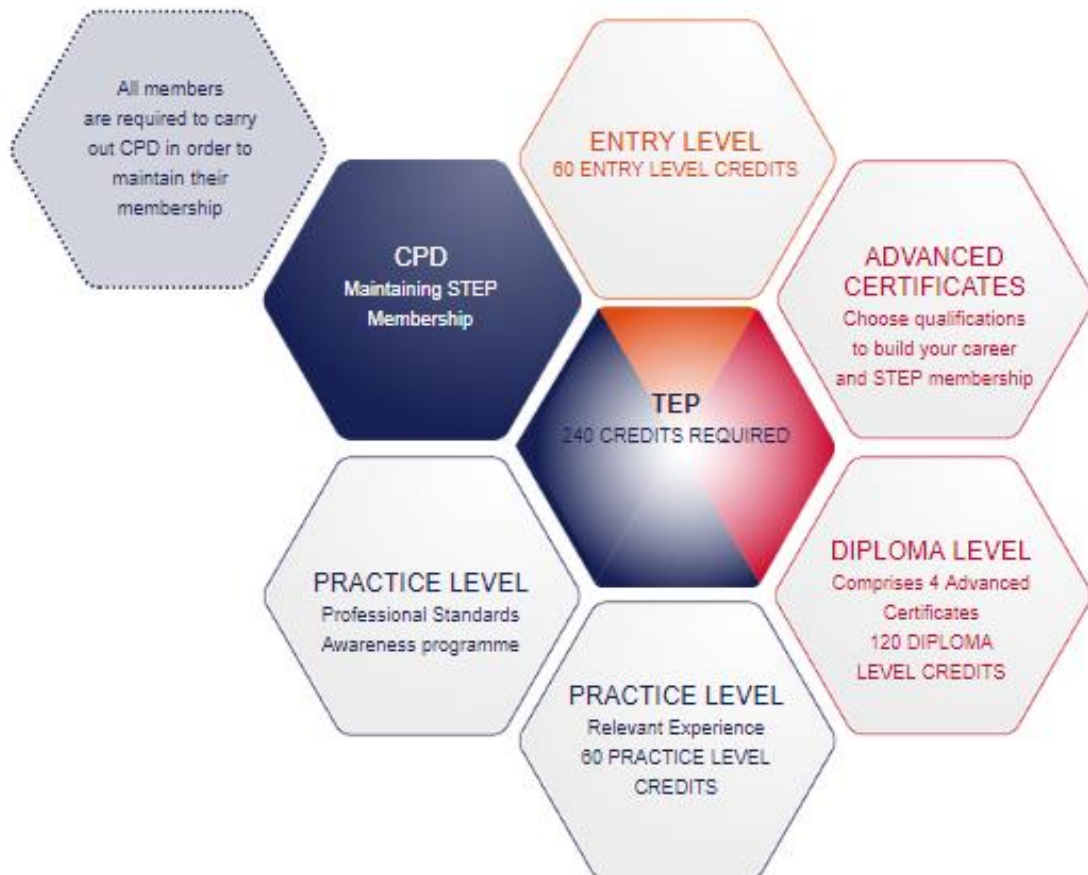
Practice Level



Practice Level



CPD



Entry Level

Applicants will need 60 credits at Entry Level to progress through to Diploma Level. Once a student has gained 60 credits at Entry Level they will be upgraded to a STEP Affiliate automatically. Entry level credits will be gained through the standard course application process with CLTI. Alternatively up to 30 Entry Level credits (maximum) can be gained through direct application for affiliate membership to STEP, based on APEL or APCL, below:

Accreditation of Prior Experiential Learning (APEL)

APEL refers to learning gained through work.

At Entry Level, APEL involves showing that you have completed a minimum of one year working in a trusts and/or estates related role, most likely under supervision. The requirement is to describe briefly the key areas of your work experience undertaken in a junior role. Entry Level experience, because it is at a junior level, is therefore distinguished from Practice Level experience which needs to include either client-facing work and/or work undertaken without direct supervision at a more

Accreditation of Prior Certificated Learning (APCL)

APCL refers to professional or academic qualifications.

APCL requires proof of qualification in an area relating to STEP, for example accounting, finance, law, trusts, estates or a wealth administration or advisory related field. This would need to be equivalent in level to a STEP Certificate, as a minimum, and to serve as an appropriate introduction to the STEP Diploma Level.

STEP Certificates normally contribute 30 credits each towards your 60 credit Entry Level requirement.

Holders of a STEP Advanced Certificate prior to April 2015 will automatically be assigned the 60 Entry Level credits.