



**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS

Details on our Full STEP Members can be found on the STEP Members page at [www.countrywidegroup.co.uk](http://www.countrywidegroup.co.uk)

**c o u n t r y w i d e**  
Tax & Trust Corporation Ltd

# Remote Training Sessions

**Remote Training sessions can found at**

**[www.countrywise.org.uk](http://www.countrywise.org.uk)**

**within the Training Section, Training Films, Slides & Webinars**

In order to help you get set up with Countrywide we have recorded a series of short remote training sessions.

The Remote Training Sessions are categorized into three sections. The first being compulsory remote training which you must view before you submit your first case. The second and third sections are recommended Remote Training. These recommended sessions relate to specific products and services such as LPA'S, Probate etc.

We recommend that when you submit a product for the first time you ensure you view the relevant recording.

Included in your Training Fee is a series of Training Webinars, which you are able to view and which will ensure a smooth transition with setting up as an Estate Planning Consultant.

Your Remote Training Sessions are presented by our staff and recorded for you to view at your own leisure. They contain key information on our Products, Services and processes.



**Countrywide, preserving your wealth for future generations**



**[www.countrywidegroup.co.uk](http://www.countrywidegroup.co.uk)**



Details on our Full STEP Members can be found on the STEP Members page at [www.countrywidegroup.co.uk](http://www.countrywidegroup.co.uk)

**c o u n t r y w i d e**  
Tax & Trust Corporation Ltd

| Remote Training Session   | Compulsory Viewing   | Recommended Viewing  |
|---|--|--|
| <ul style="list-style-type: none"> <li>New Entrants start up information</li> <li>Processing/Order Summary/Corrections</li> <li>Making Payments/Commissions</li> <li>Doc Checking/Storage/Direct Debits</li> <li>Technical Help Desk</li> </ul>   | <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul> |  |
| <ul style="list-style-type: none"> <li>Life Assurance Assignments and Pension</li> <li>Death Benefit Nominations</li> <li>Lasting Powers of Attorney</li> <li>LPA Admin and Reg to Office of Public Guardian</li> <li>Probate</li> <li>Conveyancing &amp; Conveying Property into Trust</li> <li>What is a Discretionary Trust?</li> <li>What is an IIP Trust?</li> <li>Client objections to a Trust</li> <li>Professional Trustee Service</li> <li>Advanced Estate Planning Service</li> <li>Deeds of Variation</li> <li>Live Trusts/Investments into Trust</li> <li>Trust Deeds &amp; Verbal Trusts of Land</li> <li>Cross Option Agreements/Relevant Life</li> <li>The PPPT</li> <li>Business Development</li> </ul> |  | <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul> |

We recommend that you view as many of these sessions detailed above, as possible. To participate in all subsequent Remote Training Sessions you will need to be a fully paid up member of Countrywide.

For more information please call us on **01926 514 390 Ext 9170**  
or email [newentrants@countrywidegroup.co.uk](mailto:newentrants@countrywidegroup.co.uk)

Countrywide, preserving your wealth for future generations



[www.countrywidegroup.co.uk](http://www.countrywidegroup.co.uk)