



**STEP  
Diploma**

**The benchmark qualification for  
trusts and estates. Recognised  
globally; tailored for you.**

**STEP**   
ADVISING FAMILIES ACROSS GENERATIONS

[www.step.org/diploma](http://www.step.org/diploma)

## **What is the STEP Diploma?**

The STEP Diploma is the benchmark qualification for those working in the field of trusts and/or estates. It is designed and delivered by practitioners, for practitioners, and is recognised and respected by employers, regulators and clients across the world.

## **How will it benefit my firm?**

Completing the Diploma allows you to:

- Develop your technical knowledge
- Enhance the service you offer to your clients
- Gain a globally recognised qualification
- Become a Full Member of STEP

By joining STEP, you will become a part of the leading international network of more than 21,000 experts in trust and estate planning. As a Full STEP Member, you will be able to use the letters 'TEP' after your name to showcase your expertise in this field and stand out from the competition.



***'Unlike many professional courses, the STEP Diploma applies to my day-to-day job and has enhanced my own personal knowledge and also increased my confidence. It is recognised by firms, referrers and clients. The Diploma is a major asset to my CV and professional skills.'***

## Who is it for?

All practitioners working in the field of trusts and/or estates will benefit from this qualification – from accountants, to lawyers, bankers, trust professionals, wealth managers and others. The modular approach allows you to build your own Diploma, selecting the content most relevant to you and your specialist area.

You will need 60 Entry Level credits in order to enrol on this qualification. You can acquire these credits through prior learning (certificated or experiential) or completion of Entry Level STEP Certificates.

Completing the Diploma:

- Enables you to solve client problems effectively
- Provides your clients with assurance that they are receiving advice from someone highly qualified to do so
- Enhances your ability to give holistic advice to clients as a trusted advisor
- Distinguishes you and your firm from the competition



***‘Clients and fellow professionals recognise the Diploma and that helps with referrals and obtaining new clients.’***

Kai Fung Calvin Lo TEP, Stevenson, Wong & Co

## How does it work?

Build a STEP Diploma that works for you by choosing from our extensive suite of Advanced Certificates. Combine four Advanced Certificates to make up your Diploma. Choose at least one from Set 1 and one from Set 2 and two from anywhere else.

With more than 20 papers to choose from, and electives covering the subjects of family business, vulnerable clients, cross-border estates and trust disputes, you can build a Diploma that really works for you.

You can browse the full range of Advanced Certificates in Sets 1, 2 and 3 at [www.step.org/diploma](http://www.step.org/diploma)



**Private wealth administration and governance**



**Tax and compliance**



**Electives**

## Need help deciding which papers to take as part of your Diploma?

Don't worry; we have a number of recommended combinations tailored to certain regions or practice areas. See them all at [www.step.org/diploma](http://www.step.org/diploma)



***'The STEP Diploma provided me with a comprehensive package of legal knowledge and industry insights, which is invaluable in my practice. It provides me with the recognition from the profession as a specialist in my practice areas, which is advantageous when interacting with clients and other professionals.'***



### **How is it delivered?**

The Diploma combines both self-study and online tuition, with each Advanced Certificate taking an average of four to six months to complete. Our online delivery means that our courses are available to everybody, no matter where in the world you are based. With access to a library of resources that can include interactive eLearning, videos, podcasts, course reading, self-assessments and more, you will be supported every step of the way.

### **Our education partner – CLTI**

For more than 20 years CLT International (part of Wilmington plc) and STEP have worked together to develop a range of qualifications and training programmes for the trusts and estates industry. Together, we have designed study and membership paths that fit your needs, as well as the needs of employers and regulators.

# STEP Diploma



***'We encourage all private client solicitors to complete the STEP Diploma. It is the most comprehensive and relevant qualification in the trusts and estates field. It provides our clients with assurance that they are receiving advice from highly qualified solicitors.'***

Blackadders LLP  
(STEP Platinum Employer Partner)

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**Find out more**  
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