



THE ONLY ADVANCED  
SPECIALIST QUALIFICATION  
IN THE WILL WRITING FIELD

STEP ADVANCED CERTIFICATE IN WILL  
PREPARATION - ENGLAND AND WALES

**Gain 30 Diploma Level  
credits towards Full  
STEP membership!**

## The STEP Advanced Certificate in Will Preparation is the only advanced specialist qualification in the will writing field.

This is the benchmark qualification for TEPs, solicitors, barristers and professional will writers, which will enable you to demonstrate that you are a professional quality service provider in this field.

As private wealth continues to grow significantly and family structures are becoming more complex, the need for properly qualified and capable will draftsmen continues to increase. Even well-drafted wills might not reflect the circumstances and real needs of the individual unless the will draftsman has the breadth and depth of knowledge to ask the right questions and advise the client appropriately.

Regulation of will writing (alongside Probate and Estate Administration) seemed a certainty but, in May 2013, the recommendations of the Legal Services Board were rejected by the Lord Chancellor and the Ministry of Justice. In the absence of regulation, what is there to differentiate the quality provider of will writing services from those who have less training and experience in the eyes of the client? The answer is training, qualification, expertise and professionalism.

This advanced, specialist course will develop your knowledge of the law and best practice in relation to will preparation, enabling you to provide clients with technical, high quality wills. By enhancing your client-facing skills, this course will allow you to offer clients a holistic, comprehensive service that meets the highest levels of competence and professional standards.

**“The STEP Advanced Certificate in Will Preparation has given me the confidence to know I am advising my clients properly. Being able to show my clients that I have a specialist qualification in will writing has been useful in marketing my department.”**

**Sarah Hirst,**  
Associate Solicitor,  
Quality Solicitors Bradbury Roberts and Raby

To register or to download an application form visit [www.step.org/ADcertWP](http://www.step.org/ADcertWP)

## KEY LEARNING OUTCOMES

Completing the programme successfully will validate your competence and enhance your expertise in:

1. Fulfilling your duty of care to your clients
2. Taking instructions for the preparation of the will
3. Managing client interviews
4. Advising your clients on issues of tax in response to their particular needs
5. Drafting a will to meet your clients' wishes and circumstances

Completing this course will also enable you to meet your full, annual STEP CPD requirement. **For more information on STEP CPD visit [www.step.org/cpd](http://www.step.org/cpd)**

## BUSINESS OUTCOMES



The **STEP Advanced Certificate in Will Preparation** is both practical and underpinned by academic rigour. The core text has been written by Martyn Frost TEP and Toby Harris TEP, well-known writers, presenters and practitioners in the field of wills, estates and taxation. As such, it can be integrated into your business solutions straightaway. Successfully completing the Advanced Certificate will:

- Allow you to use the STEP Will Writing Code logo, showcasing your expertise\*
- Provide you with a recognised qualification in this field
- Enhance your ability to give holistic advice to clients as a trusted advisor
- Support you in building your reputation as a will draftsman
- Enhance your private client practice offering
- Enable you to meet your annual STEP CPD requirement
- Develop your own technical competence

\*Subject to active STEP membership

## COURSE STRUCTURE AND ASSESSMENT

### The Advanced Certificate is delivered through a blend of distance learning and three face-to-face workshops.

The highly effective workshops focus on key topics from the course modules, an interactive session on client-handling skills and preparation for the examination.

The course will take six months to complete and includes the following modules:

- The process of will preparation
- Client interviews and taking instructions
- Testamentary capacity and undue influence
- The foreign element
- Joint property
- Inheritance Act 1975 claims
- Tax 1: general issues
- Tax 2: specific issues
- Drafting the will
- Non-standard wills
- The execution and revocation of the will
- Traps you must be aware of in preparing a will
- Other areas of law for the will draftsman

To gain this Advanced Certificate you must pass a three-hour, closed book examination and complete two online exercises - the first on client engagement skills and the second on will-drafting.

## ENTRY ADVICE

The Advanced Certificate is specific to England and Wales and is set at the level of the STEP Diploma. It is suitable for professionals who have existing practical experience of both taking instructions and drafting wills as well as a working knowledge of the legal and taxation implications of wills. As part of the STEP Qualifications and Membership Framework (QMF), you will need to have 60 Entry Level credits to enrol on this Advanced Certificate. Entry Level credits can be gained through completion of Entry Level Certificates and/or accreditation of prior certificated or experiential learning.

## ROUTE TO MEMBERSHIP

**30**  
STEP Diploma Level  
credits gained on  
completion!



Completing this Advanced Certificate will provide you with 30 Diploma Level credits towards a Specialist Diploma in Will Preparation. This, when combined with prior qualifications and work experience, enable you to apply for Full Membership of STEP, which includes use of the TEP designation.

To find out more about visit [www.step.org/specialist](http://www.step.org/specialist)

## COST AND HOW TO APPLY

The course fee for this Advanced Certificate is £1,395 + UK VAT. (STEP members £1,245 + UK VAT). This fee includes:

- Bespoke course manual
- Three full day workshops
- Access to an online learning platform including:
  - an e-learning module on client engagement skills
  - an online, video self-assessment on client engagement skills
  - an online will-drafting exercise
- Distance-learning support
- Self-assessment material
- Examination fees
- Parker's Wills Precedents.

To register or to download an application form visit [www.step.org/ADcertWP](http://www.step.org/ADcertWP)

Please note:

Every effort has been taken to ensure that this publication was accurate at the time of going to press but STEP and CLTI are not liable for any errors or omissions in this publication. STEP and CLTI reserve the right to vary or cancel a course or examination where the occasion necessitates. STEP and CLTI accept no liability if, for whatever reason, the course or examination does not take place.

### STEP is the **worldwide professional** association for practitioners dealing with family inheritance and succession planning.

Trust and Estate Practitioners (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 main focus is on training and development for family advisors and we help to improve public understanding of the issues families face. Our members have a broad range of professional backgrounds including accountancy, law, trusts and other specialist areas within the trust and estate industry.

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

Completing the STEP Advanced Certificate in Will Preparation will both demonstrate commitment to your professional development and add significant value to your professional practice. It will also assist you in gaining credits which you can use towards becoming a Full Member of STEP and use of the TEP designation.

**For questions on any of our courses email [pd@step.org](mailto:pd@step.org)**

## CLT INTERNATIONAL

Our training partner, CLT International, is the exclusive course provider for the STEP Certificate Series which includes the Advanced Certificate in Trust Disputes and the Advanced Certificate in Advising Vulnerable Clients. CLT International also provide the STEP Diploma Series. This comprises of the STEP Diploma programmes in England & Wales, Northern Ireland and Scotland.

CLT International has a wealth of experience of providing high quality, certificated, professional training programmes to delegates around the world.

**For questions on courses email [cltinternational@centlaw.com](mailto:cltinternational@centlaw.com)**