

# STEP ADVANCED CERTIFICATE IN WILL PREPARATION - ENGLAND AND WALES

THE ONLY ADVANCED SPECIALIST  
QUALIFICATION IN THE WILL  
WRITING FIELD

Gain 30 Diploma Level credits

Find out more at one of our open evenings  
[www.step.org/openevenings](http://www.step.org/openevenings)

## 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.

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.

### BUSINESS OUTCOMES



The **STEP Advanced Certificate in Will Preparation** is both practical and underpinned by academic rigour. 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

\* Subject to active STEP membership

### ENTRY ADVICE

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.

**30**  
**STEP Entry Level**  
**credits gained on**  
**completion.**  
Visit [step.org/credits](http://step.org/credits)

## 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)**

## 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
- Digital Assets

Enrol online at  
[www.step.org/ADcertWP](http://www.step.org/ADcertWP)

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.

## COSTS

The fee for this Advanced Certificate is

- £1,395 + UK VAT (if applicable)
- Full Members of STEP receive a discounted rate of £1,245 + UK VAT (if applicable)

The fee is fully inclusive of all learning resources, distance-learning support and assessment fees.

## WE ARE STEP

### STEP is the worldwide professional association for those advising families across generations.

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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](http://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/ADcertWP](http://www.step.org/ADcertWP)

For questions on qualifications please contact  
[pd@step.org](mailto:pd@step.org)

**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.