

Trust and Estate Practitioner (TEP)

The Trust and Estate Practitioner (TEP) certification is an internationally recognized designation. The TEP is an official title that distinguishes qualified practitioners from finance professionals who are generalists that only deal with trusts and estates on occasion.

As a TEP, practitioners are expected to possess expert knowledge in managing trusts and estates. Candidates must first become a member of the Society of Trust and Estate Practitioners (STEP) or STEP Canada. Based in London, England, STEP is an international professional body that governs the issuance and regulation of TEP designated practitioners.

Candidates must take STEP courses and pass exams to become full STEP members depending which route towards the certification is taken by the candidate.