



Short Courses

Business & Professional

Introduction to Offshore Trusts and Administration

(1 Day)

Overview

It is suitable for individuals who have recently moved to a trust department or persons who have no knowledge of trusts but would like to improve their awareness of this area.

This course is highly interactive and uses many practical exercises to introduce the student to real administrative tasks.

Course Outline

- What is a trust?
- Parties to a trust: Settlor, Trustee, Beneficiaries
- Common terms and phrases you will see
- Who sets up a trust and why
- A quick appreciation of a Trust Deed
- Duties and Powers of trustees
- Types of beneficial interest
- Types of trusts
- Trustee minutes, file notes, checklists

Pre-requisite knowledge

No knowledge of the subject is required.

CPD Certificates will be provided.



Tutor: Sara Gascoigne FCCA, BA(Hons)

Having started her career with Price Waterhouse Coopers, Sara has gone onto work as a Trust Company Director before moving into consultancy. She has engaged in a wide variety of roles from Merger and Acquisition projects; post merger integration roles through to new business set up, business developments and lecturing professional education.

Sara spent 4 years both with BPP and in a private capacity, lecturing in Cayman, BVI, Bermuda, Barbados, Gibraltar and the Channel Islands, delivering all levels of the ICSA syllabus from COFA to Professional, along with writing and delivering bespoke in-house training to some of the offshore worlds most prominent companies.

A qualified project and programme manager she returned to Jersey to continue her career, maintaining her lecturing skills by delivering a variety of courses for Forward Training.

**To reserve a space, please contact us on
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