



EARLY CAREERS · SCHOOL LEAVERS

Private Client – Estates & Trust Trainee

Earn from day one, work towards a STEP qualification - all while growing within an award-winning team from our Chesterfield office.

- No experience needed
- Just ambition

Start with us. Go further than you thought.

Leaving school and not sure a university lecture hall is for you? There is another way in. Our STEP study qualification drops you straight into a real, award-winning team — earning, learning and working towards a respected professional qualification.

You will join our Trusts & Estates team, helping to look after some of our clients' most important and personal affairs. To begin with, you will provide day-to-day support to the team. As your knowledge and confidence grow, so does what you do – this is a career with real opportunities.

Just the ambition to shape your future.

THE ESSENTIALS

Role	Private Client – Estates & Trust Trainee
Focus	Trusts & Estates
Department	Private Client
Location	Chesterfield
Route	STEP certification
Experience	None needed

STEP Gold Employer Partner

Shorts is one of a select group of firms recognised for excellence in developing trust & estate professionals.

An award-winning team

You will learn beside Chartered Tax Advisers, STEP-qualified practitioners and legally qualified advisers.

What we actually do

Imagine your grandad wants to leave some money for you — but not until you're 18, because right now you might spend it all on trainers (fair enough). So instead of giving it to you directly, it goes into something called a **trust** — basically a locked box that holds money or property safely for someone, until the right time or the right person comes along. We're the ones who help set that up and look after it properly until then.

Now imagine someone passes away. Everything they owned — their house, savings, belongings — that's called their **estate**. Before any of it can go to their family, someone needs to sort it all out properly: pay off anything owed, follow their wishes, and make sure everyone gets exactly what they're supposed to. That's called dealing with someone's estate — and again, that's us.

And a **will**? That's just the instructions someone leaves behind, saying who gets what. Our job is to make sure those instructions are followed properly, so nothing gets lost, missed, or messed up.

A trust

A safe holding place for money or property, looked after until the right time or the right person.

An estate

Everything a person owned — their house, savings and belongings — gathered up and passed on.

A will

The instructions someone leaves behind, saying exactly who gets what.

So in short: we help protect people's money and property, and make sure it ends up with the right people, at the right time — whether that's a trust for a grandchild, or an entire estate after someone passes away.

It's personal. It's important. And you'll be helping real families with real moments like this, from day one.

Imagine this...

Your grandma passes away. She leaves behind:

A house

Some savings

A car

A jewellery collection

A much-loved dog called Trevor 🐕

"I'd like my savings to help pay for my grandchildren's university costs, and I want my house to be sold and shared equally between my children."

Sounds simple, right? Well... someone has to make that happen. Someone needs to:

✓ Find out what assets she owned

✓ Deal with the legal paperwork

✓ Distribute everything to the right people

✓ Contact banks and investment companies

✓ Work out any tax that may be due

✓ Follow the instructions in the Will

That's where we come in

We're the people who help families sort everything out during what can often be a difficult and emotional time.

What about a trust?

Think of a trust like a holding pot. Say a parent wants to leave £50,000 for their 10-year-old child. The child is too young to manage that money themselves, so it's placed into a trust until they're older.

Our team helps manage those trusts — the paperwork, accounts and tax — and makes sure everything is done correctly.

WHY IT MATTERS

The work we do isn't just about numbers and paperwork. It's about helping families during important life moments, making sure people's wishes are carried out correctly, and giving clients peace of mind that everything is being looked after properly.

Every estate tells a story. Our job is to help our clients write their last chapter.

What you will actually be doing

You will start by supporting the team day-to-day — and take on more as your knowledge and confidence build. A real job, from your very first week.

01

Keep the team running

Filing, scanning and keeping client records accurate in our systems.

02

Shape client letters

Help prepare and format correspondence and documents, guided by senior colleagues.

03

Welcome new clients

Check and verify new client information, reviewing identity documents and proof of address to meet legal requirements.

04

Be the friendly first voice

Answer the phone and handle straightforward queries, passing technical ones up the team.

05

Study towards your qualification

Study towards a recognised STEP certification.

06

Grow into more

Take on greater responsibility as your skills develop through the apprenticeship.



Your role grows with you

The job you are doing at the end of your studies looks very different from day one. As you learn, we hand you more — real responsibility, real client work, real progress.

From day one to fully qualified

A clear path, fully supported at every step — with your STEP studies funded by us.

STEP 01

Get stuck in

Join the team and master the day-to-day support that keeps everything running.

STEP 02

Start studying

Progress to STEP study — fully funded and supported.

STEP 03

Take on more

Handle more complex work as your knowledge and confidence build.

STEP 04

Qualify & progress

Earn onward STEP qualifications and build a genuine career in the profession.

Is this you?

WHAT YOU WILL NEED

5+ GCSEs at grade 4/C or above, including English & Maths

Studying A-levels (or equivalent)? Great! But if your results are not quite what you hoped for, do not panic. We know exam results are only part of the story, and we will look at the whole person, not just the grades.

A degree is not required

Eligible to enrol and register as a STEP Student Member

A love for Nando's

SKILLS YOU WILL BRING

Good with numbers & an eye for detail

A clear communicator, written & spoken

Organised and able to meet deadlines

Proactive, keen to learn, confident with Excel

The confidence to ask questions and the kindness to laugh at the occasional terrible joke.

EXPERIENCE

None required.

Any office or customer-facing experience is a bonus — but teamwork from school, college, part-time work or clubs counts for just as much.

What is STEP?

You know how doctors and lawyers have to study and pass exams to prove they know what they're doing? It's the same idea here.

STEP stands for the **Society of Trust and Estate Practitioners** — the official, respected qualification for anyone working with trusts, wills and estates. Getting STEP-qualified means you've proven you really know your stuff, and it's recognised across the whole profession — not just at Shorts.

The best part? You don't need to go to university or pay a penny for it. We fund your STEP studies for you, and you study while you're working and earning — not instead of it.

So instead of spending years (and money) in a lecture hall, you're learning on the job, getting paid, and working towards a genuine professional qualification at the same time. By the time you're STEP qualified, you won't just have a piece of paper — you'll have years of real, hands-on experience to back it up.

Fully funded

We pay for your STEP studies from start to finish — no university, no student debt.

Earn while you learn

You study on the job, getting paid the whole way through — not instead of working.

Recognised everywhere

A professional qualification respected right across the profession — not just at Shorts.

No university. No debt. Just real experience and a genuine professional qualification — all at the same time.

Looked after, from your very first day

We look after our clients brilliantly — and our people just as much. A genuinely different place to build a career.

25+ days holiday

Plus bank holidays, long-service days and buy/sell.

Zero-overtime culture

Any extra hours taken back as time off in lieu.

Flexible start & finish times

Start between 8am–9:30am, long lunch options, finish 4:30pm–6:00pm.

Real wellbeing support

Mental Health First Aiders and an assistance programme.

Structured training

Personal development that keeps on going after you qualify.

Room to grow

Nearly a quarter of our team have been here 10+ years.

Paid volunteering

One paid day a year to volunteer for a cause close to your heart.

The Extras

Free car parking, plus fruit and biscuits in the office every day.

Peace of Mind

Pension, life assurance and a health cash plan, all as standard.

Salary from day one

Earn from your very first day — with no student debt.

Dedicated mentoring

Coaching and support from experienced colleagues and managers.

Structured progression

Clear career progression and development pathways.

Time to study

Dedicated time for study, exam preparation and apprenticeship learning.

Open-door culture

Open-door access to managers, directors and partners.

Great Place to Work

Recently recognised, based on employee feedback on trust, fairness, pride and culture.

Social calendar

Social events, Christmas parties and summer socials.

Dress for your diary

Dress to suit whatever your day has in store.

Ready to start?

One friendly conversation is all it takes to get going — no polished CV required.

READY TO START?

Have a chat with Laura

Laura will tell you everything you want to know about the role and help you apply — no polished CV required to start the conversation.

Laura Collins

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[Laura Collins on LinkedIn](#) 🍷

