

MEMBERSHIP APPLICATION FORM

For office use only
Membership No:

www.step.org

Please read and complete the section below before submitting your application.

All sections of this form must be completed. Incomplete application forms or those without payment of the annual membership fee and TEP registration fee (for full membership) will not be processed.

All membership application forms must be sent to your local branch or chapter. They will then forward your application to the STEP Membership Department. Your local Branch/Chapter Secretary's details can be found on the STEP website at www.step.org/branches-chapters

If you have any queries regarding your application, please contact your local Branch/Chapter Secretary or the STEP office on +44 (0)20 3752 3700 or email step@step.org

Please keep a photocopy of this form and allow eight to ten weeks for us to process your application.

- ☐ I have attached a cheque or included credit/debit card details for payment or made payment by BACS.
- ☐ I have attached to this form an existing CV/resumé (or 500 word document) detailing my trust and/or estate experience. See Section 2 for details.
- ☐ Two separate declarations have been provided in Section 4. These were signed by a current full STEP member, my employer or an independent professional.
- ☐ I have signed and dated Section 6.

Complete the form in English and type or print in BLOCK LETTERS

1. Personal Details

*Indicates mandatory fields

Title (e.g. Mr/Mrs)*:

First Name(s)*:

Family Name*:

Date of Birth:

Gender:

☐ Male ☐ Female

Job Title*:

Department*:

Designation:

Firm Name*:

Business Address*:

PO Box Number:

City/Town:

County/State/Province:

Post Code/Zip Code:

Country:

Work Email*:

Telephone Number
(incl. area code):

Mobile Number
(incl. area code):

1. Personal Details (continued)

Home Address (if different):

City/Town:

County/State/Province:

Post Code/Zip Code:

Country:

Home Email:

Preferred Mailing Address ☐ Work ☐ Home

Preferred Email Address ☐ Work ☐ Home

2. Experience and Qualifications

For Full Membership

Has your occupation over the last five years included a significant involvement at a specialist level with one or more of the following: planning, creation, management of and accounting for trusts and estates, executorship administration and related taxes? ☐ Yes

For Technician Membership

Has your occupation over the last two to five years included a significant involvement at a specialist level with one or more of the following: planning, creation, management of and accounting for trusts and estates, executorship administration and related taxes? ☐ Yes

Please state the number of years of experience you have in the trust and/or estate field: _____ years _____ months

Please attach to this form an existing CV/resumé (or a 500 word document) detailing your trust and/or estate experience over the last five years for full membership, or two to five years if applying for associate membership. Applications without an attached CV/resumé will not be processed.

2. Experience and Qualifications

Please tick the box(es) to show which qualifications you have and include a copy of your signed certificate(s).

- | | |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <input type="checkbox"/> Qualified barrister | <input type="checkbox"/> Fellow of a Taxation Institute |
| <input type="checkbox"/> Qualified solicitor | <input type="checkbox"/> Fellow of a Banking Institute |
| <input type="checkbox"/> Chartered accountant | <input type="checkbox"/> Associate of a Taxation Institute |
| <input type="checkbox"/> Certified accountant | <input type="checkbox"/> Associate of a Banking Institute |
| <input type="checkbox"/> Fellow of the Institute of Legal Executives | <input type="checkbox"/> Institute of Chartered Secretaries and Administrators |
| <input type="checkbox"/> Other, please specify: | |

3. Branch/Chapter Affiliation

Members of STEP must be affiliated to their local branch or chapter. Please specify which branch or chapter you wish to be affiliated to:

Completed application forms must be returned to the branch or chapter you have chosen. Details of branches and chapters can be found at www.step.org/branches-chapters

4. Declaration

Please ensure two separate declarations are completed. These can be signed by a current full STEP member, your employer or an independent professional.

I confirm that the details given in section 2 are correct.

i Full Name:

Telephone:

STEP Membership Number (if applicable):

Firm/Company:

Signature:

Date:

ii Full Name:

Telephone:

STEP Membership Number (if applicable):

Firm/Company:

Signature:

Date:

5. Annual Membership Subscription Payment and TEP Registration Fee

Full membership: Subscription fee + TEP registration fee

Technician membership: Subscription fee only.

Please visit www.step.org/fees for subscription and TEP registration fees

Please tick the appropriate box

☐ I enclose a cheque for _____ drawn on a British bank/bankers draft/international money order made payable to STEP.

☐ I have enclosed a foreign currency cheque for \$/€ _____ made payable to STEP.

BACS Remittance

☐ I have made payment by BACS and quoted my name in my payment reference.

For bank details please email accounts@step.org

NOTE: When paying by BACS all bank charges must be covered.

Date of BACS transfer:

Amount transferred:

Transfer made by (account name):

☐ I authorise you to debit my Maestro/Visa/MasterCard/American Express (delete as appropriate)

Name of cardholder:

Credit card number:

Card expiry date:

Card start date:

Issue no. (Maestro only):

Date:

Signature of Cardholder:

NOTE: Credit card payments will be debited in pounds sterling at the rate of exchange used by your credit card provider.

Applications without payment will not be processed.

6. Applicant's Declaration

Please read and complete the four sections below before signing this declaration.

- ☐ I confirm that the information given in this form is true and accurate to the best of my knowledge and belief. Accordingly, I hereby make application to the Board of Directors of the Society to be admitted to membership, and I authorise the Board to make such enquiries concerning this application as it deems necessary.
- ☐ I have read and understood the Society's Code of Professional Conduct and Constitutional Framework and accept the authority of the Society to enforce its rules and regulations as issued from time to time. I am aware that the current documents are published and are available via the Society's website www.step.org and that if I am breach of any of the Code, the rules or regulations, disciplinary action could be taken which may result in suspension or exclusion of my membership and/or other sanctions being imposed, including a costs penalty.
- ☐ I further confirm that I have not been subject to any criminal, disciplinary or other matters which may breach the STEP Professional Code of Conduct that have not already been brought to the attention of STEP's Professional Standards team. I am aware that as STEP membership is a contract under English and Welsh law I am required to declare any criminal convictions under the provisions of the UK Rehabilitation of Offenders Act 1974. I understand that the UK Rehabilitation of Offenders Act 1974 does not apply to the accountancy or legal profession, and therefore that I may be required to disclose spent convictions; that is any conviction irrespective of its age and/or type.
- ☐ I undertake to pay such subscriptions as are levied by the Board of Directors of the Society and all other monies owed by me to the Society or any of its parts.

Signature: _____

Date: _____

D	D	M	M	Y	Y	Y	Y
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To be completed by Branch/Chapter only

For completion by Branch or Chapter Chair/Secretary (delete as appropriate)

- ☐ I confirm that this applicant has/has not (delete as appropriate) been recommended for approval at Branch/Chapter level, has completed this form fully and enclosed payment.

Name: _____

Branch/Chapter: _____

Signature: _____

Date: _____

D	D	M	M	Y	Y	Y	Y
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7. Data Protection

The information you provide will be used by the Society, its subsidiary companies, STEP branches/chapters or approved agents for administrative and membership purposes or as required by law. We will use your information to keep you up-to-date with news and developments in the industry, via both email and post. Our News Digest emails provide you with an overview of current news articles and reports relevant to your practice and the STEP Journal provides news, trends and issues facing trust and estate practitioners; industry debate, incisive comment and thoughtful analysis; legislative developments and implications; technical briefings and taxation updates; book and product reviews; and listings of Society meetings and events for the months ahead.

We do not sell lists of our members, but may pass your details on to local STEP branches/chapters acting on STEP's behalf as well as third parties with whom STEP works closely, for example our education partner. This includes overseas companies based outside the European Union (for example, companies based in the US and Canada) to enable them to send you information about products and services that are relevant to your membership and are approved by STEP.

Please note that by submitting this application form, you will be indicating your consent to receiving such messages by email, SMS and/or post from STEP, local STEP branches/chapters and other third parties approved by STEP. If you do not want to receive this kind of information from STEP and/or third parties, please let us know by ticking the relevant box below.

The Society also produces lists of STEP members for issue to the public (i.e. the STEP Directory & Yearbook and Online Directory). These lists appear on the public area of the STEP website. If you do not wish your contact details to appear on these lists please tick the relevant box below.

- ☐ I do not wish to receive mailings from STEP (please note that this includes the STEP Journal).
- ☐ I do not wish to receive emails from STEP (please note that this includes all STEP email newsletters).
- ☐ I do not wish to receive SMS messages from STEP (please note that STEP will not charge you for any SMS messages sent to you).
- ☐ I do not wish to receive mailings (including emails) from third parties approved by STEP relating to products and services that are relevant to my membership.
- ☐ I do not wish to have my contact details appear on lists of STEP members that are issued to the public or appear on the public area of the STEP website.

[STEP members can update their email and mailing preferences at any time by logging into the STEP website.](#)

If you would like further information on how STEP uses your personal information please refer to our Privacy Policy which can be found on our website, or contact us at step@step.org.

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8. How did you hear about STEP?

Please select one of the following or detail below:

- | | | | |
|---------------------------------------------|----------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Colleague/Employer | <input type="checkbox"/> STEP branch/chapter | <input type="checkbox"/> STEP conference or event | <input type="checkbox"/> CLT International |
| <input type="checkbox"/> STEP member | <input type="checkbox"/> STEP email | <input type="checkbox"/> Industry publication (please specify) _____ | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> STEP Journal | <input type="checkbox"/> STEP website | | |

9. Specialisations

Please select the specialisations that best match your current role. This information will be used in the Online Directory and will help STEP tailor its products and services to you.

	Non-Resident (Offshore) Specialisation	Cross-Border Specialisation	Resident (Domestic) Specialisation
Agricultural property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anti money laundering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charities – formation and administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company formations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contentious trusts & estates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross border estates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estate administration & accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estate planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Executorship & probate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family office administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mediation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental capacity issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Philanthropy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rural family & business administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax investigations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust formation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Profession

Please select from the following information which will be used in the Online Directory and STEP Directory and Yearbook.

- | | | | |
|-----------------------------------------|----------------------------------------------------|--------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Accountant | <input type="checkbox"/> Financial planner | <input type="checkbox"/> Legal executive | <input type="checkbox"/> Trust officer |
| <input type="checkbox"/> Banker | <input type="checkbox"/> Insurance advisor | <input type="checkbox"/> Notary | <input type="checkbox"/> Wealth management |
| <input type="checkbox"/> Barrister | <input type="checkbox"/> Judge | <input type="checkbox"/> Tax advisor | <input type="checkbox"/> Will writer |
| <input type="checkbox"/> Estate planner | <input type="checkbox"/> Lawyer/solicitor/attorney | <input type="checkbox"/> Trustee/fiduciary | |

11. Firm Type

Please select from the following information which will be used in the Online Directory.

- | | | | |
|-----------------------------------------------|-----------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Academic institution | <input type="checkbox"/> Consultant | <input type="checkbox"/> Legal firm | <input type="checkbox"/> Trust company – law firm owned |
| <input type="checkbox"/> Accountancy firm | <input type="checkbox"/> Family office | <input type="checkbox"/> Private bank | <input type="checkbox"/> Trust company – other |
| <input type="checkbox"/> Bank | <input type="checkbox"/> Financial advisors | <input type="checkbox"/> Lawyer/solicitor/attorney firm | <input type="checkbox"/> Wealth management firm |
| <input type="checkbox"/> Chambers | <input type="checkbox"/> Insurance firm | <input type="checkbox"/> Tax advisors (non-accountancy firm) | <input type="checkbox"/> Will writing firm |
| <input type="checkbox"/> Charity | <input type="checkbox"/> Investment management firm | <input type="checkbox"/> Trust company – bank owned | |