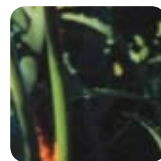
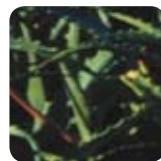
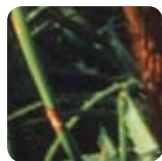
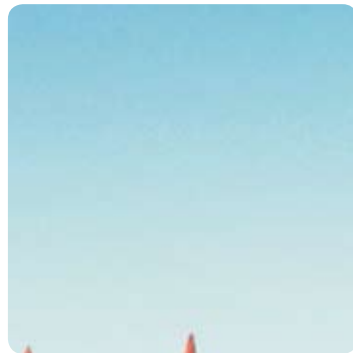


# Member Services from STEP Worldwide



# Member Services from STEP Worldwide

When you join STEP you join a leading professional network of more than 15,000 members spanning over 60 countries in common and civil law jurisdictions.

STEP membership ensures that you remain ahead of the competition, on top of regulation and at the forefront of your profession. Membership also entitles you to an array of benefits.

## Education

STEP Certificates and Diplomas are recognised as essential qualifications and TEPs are sought after by employers. A portfolio of courses designed to enhance your career are provided by Central Law Training, a worldwide training organisation.

### STEP Certificate Series

The STEP Foundation Certificates are designed for students who are either new to the industry or currently employed in administrative or clerical positions in the trust and estate field.

The *STEP Certificate for Financial Services (Trusts and Estate Planning)* is designed to enable those in the financial services industry to work more effectively with private client professionals.

### STEP Diploma Series

The STEP Diplomas suit those who wish to specialise in the trust and estate field. Completing one of the diplomas involves sitting four exams, in some cases tailored to the jurisdiction.

*The STEP Diploma for England & Wales (Trusts and Estates) Accountants and Tax Practitioners* is a qualification for accounting and tax specialists focusing on the legal principles and practices underlying the administration of trusts and estates.

Browse the list of STEP Certificates & Diplomas currently available at:

[www.step.org/pd](http://www.step.org/pd)

### BSc in Management and Trusts and Estates

The University of Manchester will be offering a new BSc degree programme in 2011 in Management and Trusts and Estates. TEPs who have qualified via the STEP Diploma in International Trust Management and the STEP Diploma for England and Wales (Trusts and Estates) will be able to top-up their qualification into a BSc honours degree.

[www.step.org/bsc](http://www.step.org/bsc)

### STEP Qualified Practitioner Route

The STEP Qualified Practitioner (QP) Route is a route to full membership for trust and estate practitioners who have established themselves in the field. QP students submit three papers of 2,500–3,000 words on topics relevant to their jurisdiction.

[www.step.org/qp](http://www.step.org/qp)

### STEP Events and CPD

Each year, STEP organises high quality conferences, seminars and lectures. These events offer continuing professional development (CPD) to help you stay ahead of your peers. Held at an international, national and regional level, these are major forums for topical industry discussion, presented by senior practitioners and academics. All conferences and seminars are CPD accredited.

[www.step.org/events](http://www.step.org/events)

### STEP Branch Events & Networking

The key to STEP's success lies in its network of branches. STEP's local branch network spans over 35 countries in common and civil law jurisdictions. STEP branch events offer opportunities for practitioners to build relationships, share expertise and remain up-to-date on trust and estate developments. Branches are run by voluntary committees who are responsible for their own educational and social activities. To find out what is happening in your branch please visit: [www.step.org/branches](http://www.step.org/branches)

### Special Interest Groups

STEP Special Interest Groups offer you the chance to network with other members with whom you have a shared specialism to discuss the subject and advance your knowledge in the area. Special Interest Groups include: Business Families, Mediation, Charities UK, Sydney Charities, Cross Border Estates and Philanthropy.

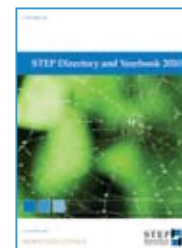
[www.step.org/communities](http://www.step.org/communities)

### STEP Trusts Discussion Forum

The STEP Trusts Discussion Forum is a moderated email distribution list. This forum is dedicated to discussion by practitioners of topics relating to the drafting and administration of trusts, wills, taxation and other private client issues. It is primarily concerned with issues which arise for advisors in the UK although non-UK practitioners may find some discussions useful.

[www.trustsdiscussionforum.co.uk](http://www.trustsdiscussionforum.co.uk)

### STEP Directory & Yearbook



The *STEP Directory & Yearbook* is published and distributed to all members on an annual basis. It contains over 700 pages of jurisdictional information and the contact details of all STEP members.

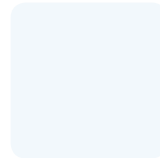
To ensure your contact details are correct visit: [www.step.org/mydetails](http://www.step.org/mydetails)

### Search for a STEP Member

The Search for a STEP Member function is an online directory of STEP members and is searchable by the general public. Entries are updated regularly to ensure the general public gain access to the most up-to-date information.

To search for a STEP member please visit: [www.step.org/stepmembersearch](http://www.step.org/stepmembersearch)





## STEP Journals



All members receive the *STEP Journal* by post, which is published ten times a year. The *STEP Journal* contains industry news, jurisdictional reviews, regulatory and taxation updates, book reviews, recruitment, an events calendar and the latest developments for practitioners.

Members also receive the *Trust Quarterly Review (TQR)*, which is produced in association with TACT and contains the latest technical papers from leading practitioners.

## STEP Journal Website

The new dedicated [stepjournal.org](http://stepjournal.org) website features a fully searchable *STEP Journal* archive, which allows readers to search through all *STEP Journal* articles since the magazine's redesign in 2008. STEP members can search by keyword or subject area and be provided with a list of articles to choose from in which this subject is covered.

[www.stepjournal.org](http://www.stepjournal.org)

## Jurisdiction Summaries

The [stepjournal.org](http://stepjournal.org) website has information on all STEP jurisdictions, allowing members to access trust and tax information for each jurisdiction. The summaries are updated annually and also appear in the *STEP Directory & Yearbook*.

[www.stepjournal.org](http://www.stepjournal.org)

## E-Newsletters

As a member of STEP you are automatically subscribed to informational email newsletters; membership newsletter, international and UK domestic news digests. These newsletters provide updates within the trust and estate community.

## STEP Books

STEP commissions and publishes books and reports on subjects that are of concern to trust and estate practitioners.

STEP publications include:

- *STEP Guide to Trusts and Investments*
- *A Practical Guide to the Transfer of Trusteeships*
- *Business Families and Family Businesses*
- *Trust Taxation in Switzerland*

[www.step.org/publications](http://www.step.org/publications)

Recent conference notes are also available to order, email: [orders@step.org](mailto:orders@step.org)

## STEP Leaflets

STEP leaflets provide a reference guide for members of the public which STEP members can display in reception areas. Leaflets include:

- *STEP Explained*
  - *Trusts Explained*
  - *Why Make a Will?*
- and many more.

England & Wales, Canadian and Hong Kong versions of the leaflets are available.

[www.step.org/leaflets](http://www.step.org/leaflets)

## STEP Lobbying and Representation

STEP represents the interests of its members with regulators, government departments and international organisations such as the EU, OECD and FATF. STEP monitors legislation and where appropriate canvasses for changes in the law.

[www.step.org/policy](http://www.step.org/policy)

## STEP TV

Members can achieve unstructured CPD through STEP TV. Online videos allow you access to the knowledge of national and international trust and estate practitioners and wealth management advisors.

[www.steptv.org](http://www.steptv.org)

## STEP Job Search Website

The STEP Job Search website is an invaluable tool for organisations looking to recruit and practitioners seeking a new job. Advertising your job vacancy with STEP offers you a highly cost-effective, fast and easy way to reach your trust and estate audience. With around 25,000 visits to the website each month, [www.step.org](http://www.step.org) provides access to the highest calibre of trust and estate practitioners. Members receive a discounted rate on all job advertisements placed. Members, recruiters and agencies can now post a job on this specialist trust and estate recruitment site at: [www.step.org/jobs](http://www.step.org/jobs)

## STEP Merchandise

STEP pins, ties and scarves are now available to order. For more details visit: [www.step.org/merchandise](http://www.step.org/merchandise)

## STEP Wealth Directory

The STEP Wealth Directory allows members to search for organisations that deliver a specific service proposition to the trust and estate community providing a comprehensive profile for those organisations.

[www.stepwealthdirectory.org](http://www.stepwealthdirectory.org)

# Member Services from STEP Worldwide



The Society of Trust and Estate Practitioners is a company limited by guarantee and incorporated in England and Wales under the Companies Act 1985. Registered No. 2632423. Registered Office: Artillery House (South), 11–19 Artillery Row, London SW1P 1RT, UK.

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