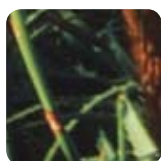
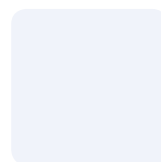
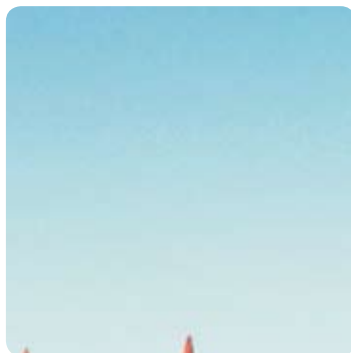
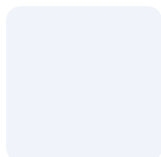


Member Services from STEP Worldwide



Member Services from STEP Worldwide

When you join STEP you join a leading professional network of more than 14,500 members spanning 66 countries in common and civil law jurisdictions.

The TEP qualification ensures that you remain ahead of the competition, on top of regulation and at the head of your profession. Membership also entitles you to an array of benefits.

Education

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

STEP Certificate Series

The STEP Foundation Certificate is designed for students who are either new to the field 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 Diploma suits those who wish to specialise in the trust and estate field. Completing the Diploma 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 Diplomas currently available at www.step.org/pd

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

STEP Events and CPD

Each year, STEP organises high quality conferences, seminars and lectures. These events offer continuing professional development to help you get and 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/conferences

Networking

STEP offers several opportunities for practitioners to share expertise and receive updates on new developments in the trusts and estates field. Our expertise – through committees, publications and special interest groups – leads academic and professional thinking in the trust and estate community. As the largest trust and estate society in the world, our regional, national and international networks offer unparalleled opportunities for professional networking and business development opportunities overseas.

www.step.org/findapractitioner

STEP Branch Events

The key to STEP's success lies in its network of branches. STEP's local branch network spans 66 countries in common and civil law jurisdictions. All branches are run by voluntary committees and are responsible for their own educational and social activities. Many branches organise annual conferences and seminars resulting in over 400 branch events a year.

www.step.org/conferences

Electronic 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 daily 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.

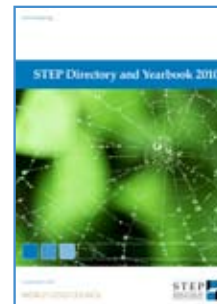
STEP publications include:

- *STEP Report – Offshore Evolution: Transparency and Solutions in Cross Border Wealth Structuring*
- *Business Families and Family Businesses: The STEP Handbook for Advisers*
- *A Practical Guide to the Transfer of Trusteeships*

www.step.org/publications

Recent conference notes are also available to order, email orders@step.org

STEP Directory & Yearbook



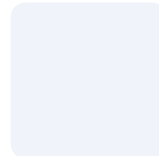
The *STEP Directory & Yearbook* is published and distributed to all members on an annual basis. It contains over 600 pages of jurisdictional information, as well as the contact details of all members.

www.step.org/findapractitioner

The STEP www.step.org/findapractitioner website is an online directory of STEP members and is searchable and accessible by the general public. This website is derived from the print version of the STEP Directory & Yearbook. Entries are updated regularly and are constantly increasing to ensure members of the public gain access to the most up-to-date information.

To ensure your details are correct visit www.step.org/mydetails





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

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. A corporate subscription rate is now also available.

www.steptv.org

Jurisdiction Summaries

The STEP 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 print in the STEP Directory & Yearbook.

www.step.org/jurisdictionsummaries

Technical Resources

The technical resources section of the STEP website includes legislation, tax treaties, forms, links, articles, book bibliographies and periodicals. This resource is provided by STEP Canada.

www.step.ca/resources.step.asp

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. The *STEP Journal* is also available digitally via the STEP website.

www.step.org/journal

STEP Journal Index

An index of all articles ever published in the *STEP Journal*, TQR and other supplements are now available online. 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.step.org/journalarchive

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 Trust?
- What To Do When Someone Dies
- Why Make a Lasting Power of Attorney?
- Why Make a Will?

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

www.step.org/publications

KYC360°

STEP members can join KYC360° for free and benefit from a wealth of AML resources and information, such as news, AML, regulation and fraud updates and discussion forums on compliance and regulation. STEP members also receive a 10% discount on subscription to the premium compliance tools.

www.kyc360.com/partners/step

STEP Job Search Website

The STEP Job Search website is an invaluable tool for organisations looking to recruit and practitioners seeking a new job. Members, recruiters and agencies can now post a job on this specialist trust and estate recruitment site at:

www.step.org/jobs

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.

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, to then identify a shortlist and view comprehensive profiles for each organisation.

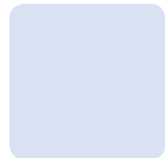
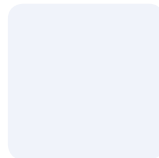
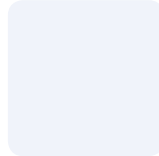
www.stepwealthdirectory.org

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 and Sydney Charities Group.

www.step.org/specialinterestgroups

Member Services from STEP Worldwide



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