



Affiliate Application Form



Membership No.

This form is to be completed by Student Members of STEP who have recently completed a STEP Certificate and wish to become an Affiliate of STEP.

Please complete all sections of this form and sign and date section 4. Complete the form in English and type or hand write the form using black ink and block capitals. Please allow eight to ten weeks to process your application.

Please note: Affiliates of STEP receive all benefits associated with STEP membership, but are not full members of STEP and cannot use the designation TEP, vote at general or branch meetings or stand for election to Council.

1. Personal Details

Title (e.g. Mr/Mrs)*:	First Name(s)*:
Family Name*:	Date of Birth: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Sex: <input type="checkbox"/> M <input type="checkbox"/> F
Job Title*:	Department*:
Firm Name:	Designation:
Business Address*:	
PO Box Number:	City/Town:
County/State/Province:	Post Code/Zip Code:
Country:	Work e-mail*:
Telephone Number (incl. area code):	Fax Number (incl. area code):
Home address (if different from above):	
City/Town:	County/State/Province:
Post Code/Zip Code:	Country:
Home email:	
Preferred mailing and email address <input type="checkbox"/> Work <input type="checkbox"/> Home	
<input type="checkbox"/> Please provide full details (by attaching to this form) if you have been involved with any professional misconduct, criminal proceedings or regulatory sanctions.	

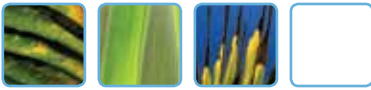
*Indicates mandatory fields

2. Branch Affiliation

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

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[Details of branches can be found at www.step.org/branches](http://www.step.org/branches)





3. Annual Subscription Payment (please tick the appropriate box)

Please see the [STEP Membership & Examination Fees form](#) for full details of fees payable for this route or contact step@step.org

If you are joining in either STEP Lucerne/Zug, STEP Lugano, STEP Vaduz or STEP Zurich Centres please do not send any payment, you will be invoiced by the local branch in CHF for any outstanding fees.

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

Foreign currency cheque: I enclose a cheque for \$/€ made payable to STEP

*I authorise you to debit my Maestro/Visa/MasterCard/American Express (delete as appropriate) for the fee of

*Please note: Payment by credit card is not available to members joining in STEP Suisse Romande (Geneva) Branch or Monaco Branch.

For applicants who have already paid the student membership fee, please only send payments for the outstanding amount.

Name of card holder:

Credit card number:

Card expiry date:

Card start date:

Issue no.(Maestro only):

Date:

Payment Amount: £

Signature of cardholder:

Please send me a receipt.

Please note that incomplete applications or those without payment will not be processed

4. Applicant's Declaration

I agree to be bound by the Society's Code of Professional Conduct and also the Branch Regulations issued by Council*.

I confirm that the details given in this application form are correct and that I am a fit and proper person to be admitted as a member of the Society.

Accordingly, I hereby make application to the Council of the Society to be so admitted. I authorise Council to make such enquiries concerning this application as they deem necessary. I undertake to pay such subscriptions as may be levied by Council and I understand that my acceptance as a member is conditional on this.

Signed:

Date:

*Details of the Society's Code of Professional Conduct and the Branch Regulations can be found on the [STEP website](#)

5. Data Protection

The information you provide will be used by the Society, its subsidiary companies, STEP Branches 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 award-winning News Digest email provides 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 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 and/or post from STEP, local STEP branches 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 (ie. the STEP Directory & Yearbook and Search for a STEP Member area). 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 relating to products and services that are relevant to my membership.

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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.

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