



# STEP Diploma for Accountants and Tax Practitioners (Trusts and Estates)

Please complete in BLOCK CAPITALS

Course Enrolment Form

## 1. Personal Details

Title: ..... First Name(s): .....

Family Name(s): .....

Designation: .....

Sex (M/F): ..... Date of Birth (optional): .....

Address: .....

City: ..... Postcode: .....

Country: .....

Telephone No - Daytime: .....

Evening: .....

Fax No: .....

E-mail: .....

**Special Requirements:**

Dietary: .....

Disability: .....

## 2. Education/Qualifications

This Diploma is for qualified accountants and tax practitioners in England & Wales. Please confirm which professional qualification you hold by ticking the appropriate box below:

- Chartered Accountant       Certified Accountant
- Chartered Tax Advisor
- Other Tax or Accounting Qualification (please state)
- .....
- .....

## 3. Employment Sector

**If you are employed please state:**

Job Title: .....

Department: .....

Area(s) of Specialisation: .....

.....

Nature of Duties: .....

.....

.....

**Do you want your employer to know that you are taking this course?**

Yes

If 'NO' move onto Section 5.

No

## 4. Employment Details

Employer: .....

Employer Address: .....

City: .....

Postcode: ..... Country: .....

Employer Contact Name: .....

Employer Job Title: .....

Employer E-mail: .....

Employer Telephone No: .....

Employer Fax No: .....

**Course materials to be delivered to:**

Home address  Employer address

## 5. Enrolment

**Please indicate where you would like to take the course:**

*Please refer to: [www.clt-step.co.uk/atp](http://www.clt-step.co.uk/atp) for a list of current locations and dates.*

**Location:** .....

**Date:** .....

**On completion of this form please send to:**

**CLT/STEP Registrar**  
**CLT International**  
**Wrens Court**  
**52 - 54 Victoria Road**  
**Sutton Coldfield**  
**Birmingham**  
**B72 1SX**

**Tel: +44 (0)121 355 0900**  
**Fax: +44 (0)121 362 7510**  
**Email: [cltstep\\_registrar@centlaw.com](mailto:cltstep_registrar@centlaw.com)**

## 6. Fees

**All prices in UK Pounds Sterling**

**Diploma** **£1,750 (plus VAT)**

**(Distance Learning Course, Workshop and Examination)**

## 7. Payment

Please tick the appropriate box:

I enclose a cheque/bankers draft made payable to CLT International

Please invoice my employer, who has agreed to pay the fee

I authorise you to debit my Visa/MasterCard (delete as appropriate)

Name on Card:

Credit Card No:

Security Code:

Card Type:

Issuing Bank:

Card Expiry Date:

Payment Amount: £

Signature of Applicant:

Date:

Signature of card holder:

Date:

Electronic Bank Transfer to:

CLT International Ltd  
Barclays Bank Plc  
London Corporate Banking  
P.O. Box 544  
54 Lombard Street  
LONDON EC3V 9EX

Sort Code 20-82-94

Account No 30568392

Ref. (your name)

Signature of Applicant:

Date:

Signature of Employer: (if paying course fee)

Date:

## 8. STEP Application

Before completing this section, please refer to the STEP website [www.step.org/branches](http://www.step.org/branches) for details of the location of STEP branches.

As a student member of STEP, I would like to join the following STEP branch:

Your welcome pack from STEP Worldwide will be sent to you in the next 6-10 weeks.

Please note that all members of STEP must comply with the Code of Professional Conduct. This can be found by visiting [www.step.org/codeofconduct](http://www.step.org/codeofconduct)

### How did you hear about STEP?

Colleague/Employer  CLT International

STEP Member  Industry Publication

STEP Journal  STEP Email

STEP Conference or Event  Other, please specify:

.....  
.....

## 9. Signature of Applicant

Signature .....

Date:

## 10. Data Protection

The information you have provided will be used by CLT International, STEP and its branches, or approved agents for administrative, membership and educational purposes or as required by law. From time to time CLT International and/or STEP and its branches may pass your details to third parties, to enable them to send you information about products and services approved by CLT International and/or STEP and its branches. If you do not want to receive mailing from third parties, please let us know by ticking the box.

I do not wish to receive mailings from third parties approved by CLT International and/or STEP and its branches relating to beneficial products and services.

## 11. Terms and Conditions

1. CLT International for itself and STEP reserves the right to vary or cancel a course or examination where the occasion necessitates.

2. Neither CLT International nor STEP accept any liability if, for whatever reason, the course or examination does not take place.

### 3. Cancellations

■ If a delegate withdraws from the course within six weeks of registration, they will be refunded the course fee less 20%.

■ If a delegate withdraws from the course after six weeks of registration, they will be refunded the course fee less 50%.

■ If a delegate attends the workshop but fails to take the examination, no refund will be paid.

### 4. Deferrals / Non-Attendance

■ Delegates may defer attendance at a workshop and the taking of an examination, limited to two

deferrals, by making prior written application to the course director at CLT International.

■ If a delegate defers attendance at a workshop and examination 4 weeks or more prior to the examination **and** transfers to a later workshop and examination date, no fee will be incurred.

■ If a delegate defers attendance at a workshop and an examination less than 4 weeks prior to the workshop and examination **and** transfers to a later workshop and examination date, an administration fee of £300 (plus VAT) will be charged.

### 5. Examinations

No delegate will be permitted to sit any examination, until any outstanding balances have been paid.

In the event that a delegate sits an examination and it transpires that balances remain unpaid, the delegate's examination answer paper will not be marked until such balances are cleared.

6. This booking form constitutes a legally binding contract. The delegate is liable for payment of all the fees due to CLT International. To the extent permitted by law, neither CLT International, STEP nor its tutors/authors will be liable by reason of breach of contract, negligence or otherwise for any loss or consequential loss occasioned to any person acting omitting to act or refraining from acting in reliance upon the course material or presentation of the course or, except to the extent that any such loss does not exceed the price of the course, arising from or connected with any error or omission in the course material or presentation of the course. Consequential loss shall be deemed to include, but is not limited to, any loss of profits or anticipated profits, damage to reputation or goodwill, loss of business or anticipated business, damages, costs, expenses incurred or payable to any third party or any other indirect or consequential losses.