

Please attach business card here



USA Membership Application Form

For office use only
Membership No.

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For use only by persons practicing and resident in the United States. Please complete all sections of this form before submission; all fees must accompany this application. Incomplete forms or those without payment will not be accepted.

You can apply for STEP membership based on your level of professional experience and qualifications. There are two membership categories:

Membership offer for new STEP members.
See opposite for details.
Valid until February 14, 2012

Full membership:
Five years' experience at a specialist level in the field of trusts and estates, including estate planning. Normally a specialist will have direct client responsibility and one or more professional qualifications (e.g. JD, CPA etc). **The cost of full membership is \$480, this includes a one time \$110 joining fee for the TEP (Trust and Estate Practitioner) designation. However, if you join before February 14, 2012 you will have the \$110 joining fee waived and up to 6 months free membership will be granted. With this offer you will only pay \$370 with your application submission now and you will not pay again until April 2013.**

Associate membership:
As full, but with two to five years' experience at a specialist level. Associate members may not use the TEP designation but you can apply for full membership once the five year experience requirement is met. **The cost of associate membership is \$370. However, if you join before February 14, 2012 you will receive up to 6 months free membership. With this offer you will only pay \$370 with your application submission now and you will not pay again until April 2013.**

All details should be typed or printed clearly in block letters as the information is used for database purposes.

1. Personal Details

Title (e.g. Mr/Mrs)*: _____ First Name and Initials*: _____

Last Name*: _____ Date of Birth: □□ □□ □□□□ Gender: M F

Job Title*: _____ Department*: _____

Degrees/Professional Designations (e.g. CPA,JD): _____

Firm Name: _____

Business Address*: _____

PO Box Number: _____ City: _____

State: _____ Zip Code: _____

Work Email*: _____

Telephone Number (incl. area code): _____ Fax Number (incl. area code): _____

Home Address (if different from above): _____

PO Box Number: _____ City: _____

State: _____ Zip Code: _____

Home Email: _____

Preferred Mailing Address: Work Home

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



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7. Specializations

Please select the specializations that best match your current role. Please note this information will be used in the online Search for a STEP Member Directory and will help STEP tailor its products and services to you.

	Non-Citizen (Offshore) Specialization	Cross-Border Specialization	USA Citizen (Domestic) Specialization		Non-Citizen (Offshore) Specialization	Cross-Border Specialization	USA Citizen (Domestic) Specialization
Agricultural Property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anti Money Laundering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charities – Formation and Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mediation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Formations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mental Capacity Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Philanthropy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contentious Trusts & Estates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Probate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross Border Estates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rural Family & Business Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estate Administration & Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tax Investigations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estate Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tax Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Executorship & Probate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Trust Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Trust Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family Office Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Trust Formation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Will Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Branch or Chapter

Please specify which branch or chapter you wish to be affiliated to (indicate closest major city and state, e.g. New York or Miami etc). Details of STEP branches and chapters can be found at www.step.org/regions

(There may not yet be a branch or chapter in your city of choice. If not, please choose the one that is nearest to you).

9. Payment of Fees

Full Membership: \$480 (includes 2012/2013 Subscription fee of \$370 + one time joining fee for the TEP (Trust and Estate Practitioner) designation of \$110*)

Associate Membership: \$370 (2012/2013 Subscription fee only)

Membership Offer:

Receive up to 6 MONTHS FREE STEP membership if you join between now through February 14, 2012. Additionally, the one time joining fee for the TEP (Trust and Estate Practitioner) designation will be waived.

With this offer you will only pay \$370 with your application submission now and you will not pay again until April 2013.

All fees are set annually and cover the membership year 1 April–31 March. Fees are not pro-rated in the year you join, because many services are provided on entry to the Society. STEP is a non-profit organization.

- I enclose a check made payable to STEP Worldwide or
- I authorize you to debit the appropriate fees from my Visa/Mastercard/American Express**

*The joining fee for the TEP designation (Trust and Estate Practitioner) is a one off fee for those applying for full membership. In subsequent years of membership only the annual subscription fee applies.

**All credit cards will be debited in pound sterling at the rate of exchange used by your credit card provider.

Name of card holder:

Credit card number:

Card expiry date:

Card start date:

Date:

Payment amount: \$

Signature of cardholder:

Please send me a receipt

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



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10. 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 authorize Council to make such enquiries concerning this application as they deem necessary. I undertake to pay such subscriptions (membership fees) 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

11. 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 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/chapters acting on STEP's behalf as well as third parties with whom STEP works closely, for example our education partner, 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/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 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 (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 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

All questions should be directed to: **All applications should be sent to:**

Jeryl Pine,
STEP USA Membership Director
Email: jeryl.pine@step.org
Tel: 212-737-3690
Fax: 917-206-4306

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