

Member Services from **STEP Worldwide**



STEP is the professional body for trust and estate practitioners worldwide comprised of attorneys, accountants, lawyers, trust officers, tax specialists, bankers and financial advisors.



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.



STEP membership allows you to:

- Use the accreditation TEP to showcase your specialist expertise in the field of trusts and estates
- Increase your profile in the industry
- Network with industry peers
- Become more involved within the industry, with opportunities to speak at conferences, join special interest groups and sit on industry related committees
- Demonstrate a dedication and commitment to the field



Member Services from STEP Worldwide

About STEP

The Society of Trust and Estate Practitioners (STEP) is a unique professional body providing members with a local, national and international learning and business network focusing on the responsible stewardship of assets today and across the generations.

STEP provides education, training, representation and networking for its members. Members advise clients on the broad business of the management of personal finance.

Full members of STEP are the most experienced and senior practitioners in the field of trusts and estates. STEP has 16,000 members spanning 66 countries.

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

Supporting STEP Students

The dedicated student area of the website provides examiners tips, student resources and FAQs. The STEP Student Newsletter keeps all our students up-to-date with course dates, student events and developments in our qualifications. Student Liaison Officers are also on hand to help students in their branch.

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. All STEP Certificates lead to Affiliation of STEP and all STEP Diplomas lead to Full membership of STEP.

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

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

STEP members have their say...

- 94% of members rated the value of their membership positively.
- 98% of all members would recommend STEP to a colleague.
- The majority of members renewed their STEP membership either for the networking opportunities with other practitioners or to further their career and enhance their profile.

Source: STEP Member Satisfaction Survey 2009





STEP Branch Events & Networking

The key to STEP's success lies in its network of branches and chapters. STEP's local branch network spans over 66 countries. STEP branch and chapter 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

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. Visit www.step.org/communities

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

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 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.
www.step.org/jobs

Jurisdiction Summaries

The 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

STEP Journals

All members receive the *STEP Journal* which 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 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

E-Newsletters

As a member of STEP you are automatically subscribed to informational email newsletters including; Membership Newsletter, International and UK Domestic News Digests. These newsletters provide updates within the trust and estate community. The UK News Digest also won the TAF (Trade Association Forum) Best Practice Award for best Electronic Communication in July 2010.

STEP Books & Reports

STEP commissions and publishes books and reports on subjects that are of concern to trust and estate practitioners.
www.step.org/publications

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

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

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?

England & Wales, Canadian and Hong Kong versions of the leaflets are available. www.step.org/leaflets

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

STEP Discussion Groups

The STEP LinkedIn group allows practitioners to discuss topical issues and share items of interest. Find the group by searching "Society of Trust & Estate Practitioners" at www.linkedin.com

The Trust Discussion Forum is dedicated to discussion by practitioners of topics relating to the drafting and administration of trusts, wills, taxation and other private client issues. Visit the forum at www.trustdiscussionforum.co.uk

STEP Merchandise

STEP pins, ties, umbrellas and scarves are now available to order. For more details visit: 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

Use of the STEP Logo

All full members of STEP (TEPs) may use the STEP logo on their business cards, website and promotional materials. The guidelines for logo usage by members are available via the STEP website.



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STEP Member Testimonials

"I believe there are two benefits to STEP membership that rank equally. First, being able to use the TEP initials gives clients a certain degree of confidence. Second, there is the technical assistance and knowledge issued by STEP to members which keeps us abreast of current issues, breaking news and technical matters."

**Danny Clifford TEP ACA CTA, Partner,
Ensors Chartered Accountants**

"Many of my clients have cross-border connections with either family, assets or their own citizenship. STEP helped me build a network of professionals with an expertise in international planning. That network can be drawn upon for guidance on questions that arise in the cross-border arena."

**Paul Stam TEP JD LL.M MS, Executive Director,
Morgan Stanley Private Wealth Management**

"STEP keeps me informed of developments in the trust and estate world on a global basis. Emails from STEP provide me with frequent updates; local STEP meetings provide me with the opportunity to hear from practitioners and to meet with other local STEP members; and STEP conferences offer a wealth of knowledge from respected practitioners from around the globe. The ability to listen to and network with professionals from around the world is particularly valuable to me. The STEP Journal and its supplements are a great source of information and provide timely updates and articles of interest in the trusts and estate world."

**Stephen J Foster TEP, Director,
RBC Wealth Management**

"Being able to use the initials TEP demonstrates to clients and potential clients our expertise in this area. Also, the STEP events allow interaction with other professionals and are a good way of keeping up-to date in this ever changing field."

**Amanda Millett TEP FCCA FMAAT, Senior Manager,
UHY Calvert Smith, Chartered Accountants**

"The STEP network enhances my own professional network and the designation assists in the promotion of my personal brand as a trust advisor."

**Julie Van der Velde TEP BSc MTAX CPA FTIA
Senior Manager – National Tax, Ernst & Young**

"The STEP qualification really motivates the individuals who study for it. You can see them mature as employees, becoming more confident and knowledgeable, which in turn benefits the clients. What benefits the clients will ultimately benefit the company as a whole."

**Pearline McIntosh ACIB TEP, Vice President
– Trust Services, Butterfield Trust (Bermuda) Limited**