

HOW TO JOIN OUR NETWORK IN AUSTRALIA

There are a range of pathways to STEP Membership, enabling you to join our network by evidencing or demonstrating experience, through assessment or by completing professional qualifications and accumulating STEP credits.

Pathways to STEP Membership

10 Years' Experience

There are two pathways to STEP membership for practitioners with 10 years' experience:

Experienced Practitioner:

A route for practitioners with a minimum of 10 years' experience in the trusts and/or estates field and a professional qualification.

Advocacy:

A route for barristers with a minimum of 10 years' experience in the trusts and/or estates field.

5 Years' Experience

There are two pathways to STEP membership for practitioners with 5 years' experience:

STEP QP Route:

A minimum of 5 years' experience and a professional qualification, plus:

- Submission of three essays of 5,000 words on topics approved by STEP Australia

Accredited Specialist:

A minimum of 5 years' experience and a professional qualification, plus:

- Accreditation as a specialist in Wills & Estates/Succession Law in NSW, VIC & QLD

Education: Open to All

Progress through Membership Levels; from Student to Affiliate, to Technician up to Full STEP Member by gaining credits through a combination of:

- Practical experience
- STEP qualifications
- STEP-Accredited Education Partner qualifications
- Other equivalent qualifications*

*Please contact PD@step.org

FULL STEP MEMBERSHIP

“Members benefit from the STEP publications, seminars and special interest groups in enhancing their knowledge of developments in the area of trusts and estates globally”.

Neil Wickenden TEP, Partner, Tax Consultancy and Compliance, HLB Mann Judd

ABOUT STEP

STEP is the worldwide professional association for those advising families across generations. With members across 95 different countries, we are the largest network of trust and estate practitioners and comprise of lawyers, accountants, financial planners, trust specialists and those working in other wealth advisory and administration roles.

ROUTES TO MEMBERSHIP EXPLAINED

Gain Membership Through Assessment and Experience

10 Years' Experience

There are two pathways available in Australia for practitioners with 10 years' experience:

Experienced Practitioner

This pathway is only available to those with a recognised vocational degree or professional qualification and a minimum of 10 years' industry experience.

Requirements:

- Minimum of 10 years' experience in the field of trusts and/or estates and a professional qualification
- Four references - including two from current STEP Members
- A detailed CV
- Evidence of a body of work in the trusts and/or estates field

Next STEPs:

Contact your local branch to see if you are eligible and then download and complete the STEP Experienced Practitioner Route application form from www.step.org/australia

Advocacy

This pathway is open to practising barristers who have 10 years of experience in fields relevant to STEP, as evidenced by three relevant opinions submitted for review by an assessor approved by STEP Australia.

Requirements:

Minimum of 10 years' experience in the field of trusts and/or estates.

Next STEPs:

Download and complete the STEP Advocacy Route application form from www.step.org/advau

5 Years' Experience

There are two pathways available in Australia for practitioners with 5 years' experience:

STEP QP Route

Professionals with a minimum of 5 years' experience can join STEP by demonstrating their practical knowledge.

Applicants for membership under this route need to research, prepare and submit three essays of approximately 5,000 words each on topics approved by STEP Australia.

The essays will be assessed by a panel of adjudicators approved by STEP Australia.

The three essays need to be completed within four years.

Requirements:

Applicants should have either a professional qualification and a minimum of five years' experience or a minimum of 10 years' industry experience to be accepted onto the STEP QP route.

Next STEPs:

Download and complete a Qualified Practitioner application form from www.step.org/qp

Accredited Specialist

Professionals who have gained accreditation as a specialist in Wills & Estates/Succession Law in Queensland, Victoria and New South Wales can use this as a route to Full STEP membership.

Next STEPs

Download and complete an Accredited Specialist application form from www.step.org/as

Please note: All applicants for Full Membership must also complete a Professional Standards Awareness case study.

Open Entry: Gain Credits Towards Membership Through Education

To move to the first level of STEP Membership you will need 60 Entry Level credits. These can be gained from:

- Academic or professional qualifications at a minimum of Australian Qualifications Framework (AQF) Level 5 (max. 30 credits awarded) AND/OR
- STEP Certificate (up to 60 credits)
- Prior Junior Level experience (max. 30 credits awarded) AND/OR

Once you have your 60 Entry Level credits you are a **STEP Affiliate**

STEP
Affiliate

The next level of membership is **STEP Technician**. To progress to this you need a minimum of 60 Diploma Level (DL) credits. These can be gained from:

- Completion of two STEP Advanced Certificates (30 DL credits awarded per Certificate) AND/OR
- Completion of two modules from Accredited Education Partners, e.g. The College of Law's LLM (Applied Law) – Wills & Estates or Charles Sturt University's Master of Applied Finance (30 DL credits awarded per module)
- Other qualifications of an equivalent level from a recognised higher education provider may be accepted, please contact pd@step.org for more information.

STEP
Technician

The third and final level of membership is **Full STEP member**. You will need 120 DL credits, plus proof of at least 2 years' mid-senior level experience. You can gain your additional credits from:

- Completion of four modules from Accredited Education Partners. For list of the core modules please see www.step.org/aep (30 DL credits awarded per module)
 - Completion of a STEP Diploma
 - Other qualifications of an equivalent level from a recognised higher education provider may be accepted, please contact pd@step.org for more information.
- You will also need to complete a Professional Standards Awareness Case Study in order to receive your Full STEP membership.

Full STEP
Member