

STEP ADVERTISING AND SPONSORSHIP POLICY

This policy applies to all advertising and sponsorship of STEP events, publications, and digital products.

Restrictions

1. STEP will not feature misleading advertising. This is advertising that, potentially or actually, misleads or affects the judgment of the consumer or which, for these reasons, is detrimental to a competitor or any jurisdiction.
2. STEP will not feature advertising or sponsorship that it considers to be inflammatory, offensive or a legal risk to STEP. STEP's decision as to what constitutes inflammatory, offensive or a legal risk is final. Examples of inflammatory or offensive behaviour may include:
 - advertising or sponsorship that may be perceived to encourage illegality;
 - an aggressive or abusive approach to tax, legal or regulatory issues;
 - making light of legal, regulatory or tax compliance obligations;
 - negative statements, either directly or implied, regarding competitors.
3. STEP, in its Code of Professional Conduct requires its members' advertising to be accurate, not to mislead, not cause public offence or reflect adversely on STEP, its membership or other professionals.
4. STEP will not feature advertising which contradicts/conflicts with any of the Society's Rules or Regulations or could be perceived as conflicting with our Codes of Professional Conduct (Code of Professional Conduct, Professional Conduct in Relation to Taxation, STEP Code for Will Preparation in England and Wales).
5. STEP will not feature advertising from organisations that may bring STEP's reputation into disrepute. This may include organisations that are subject to public scrutiny and/or where individuals are under investigation by STEP or a regulator.
6. Sponsors of STEP events may not engage in aggressive sales and marketing tactics towards delegates and must adhere to data protection rules. In addition, any promotional materials that associate the sponsor with the event must adhere to the above restrictions.

Guidelines for advertising and sponsorship

1. All advertising and sponsorship must be approved prior to publication by STEP. STEP's decision is final.
2. STEP will not, as a general rule, grant exclusivity to any one sponsor in relation to conferences.
3. Advertising and sponsorship is not linked to, and does not dictate, editorial content. STEP maintains a clear separation between its editorial and sales functions.
4. Advertorial pieces must not look like editorial and must be clearly differentiated in design and font. They must carry the strap 'Advertorial' or 'Promotional Feature'.

5. Within publications, double-page spread advertisements are acceptable, but positioning and quantity must be approved by STEP prior to booking.
6. Online banners, skyscrapers and buttons must not be too intrusive or distracting (i.e. not overlays/page takeovers/fast-moving/noisy, etc).
7. Animated GIFs are acceptable, but advertisers must ensure the central message is on the first slide, as a number of email servers won't display the animation.
8. All new types of advertising must be approved by STEP.

Considerations to be taken into account

1. STEP seeks to ensure that it is consistent in the application of this policy at all times.
2. All advertisements accepted should be responsible.
3. All advertisements should be acceptable within all jurisdictions.
4. All advertisements must comply with STEP's stated policy or position statement on a subject.
5. All advertisements must comply with legislative and regulatory requirements.
6. STEP, as a professional body, has an ethical responsibility to the wider community and acts in the public interest. We therefore need to take account of how an advert may be perceived by the public and any potential reaction.

Questions framework

1. When faced with an advert on the 'cusp', we should ask:
 - Does the advert message conflict with STEP's Codes?
 - If a conflict arises, is it significant?
 - Are we confident that policies and laws are complied with?
 - What is the current public opinion/moral compass?
 - What is the likely consequence/reaction of publishing the advert?
 - If the advert has the potential to cause 'outrage/upset' will STEP be happy/confident in defending the advert?
2. Whatever decision is reached, a written record should be retained which articulates the thought process that has been undertaken.