

AFFILIATE APPLICATION FORM

For details of the criteria to join as a STEP Affiliate, go to <https://www.step.org/affiliate>

Complete the form in English and type or print in BLOCK LETTERS

For office use only

Membership No:

www.step.org

Incomplete applications will not be processed. Completed applications must include:

- Evidence of qualification and course details for qualifications completed not listed in Appendix A
- A CV/resume demonstrating experience
- Section 6, signed and dated
- Agreed permissions, Section 7

All completed applications should be sent to step@step.org
Or if you prefer to send a hardcopy, please send to:

Membership Department

STEP, Artillery House (South), 11–19 Artillery Row
London SW1P 1RT, UK

Visit www.step.org/qualifications to learn more about STEP's Qualifications and Membership Framework (QMF).
For any questions, please email step@step.org

1. Personal Details *includes mandatory fields

Title (e.g. Mr/Mrs/Ms)*:	State*:
First Name(s)*:	Postcode*:
Last Name*:	Phone Number (incl. area code)*:
Date of Birth: <input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	Mobile Number (incl. area code):
Gender: Male <input type="checkbox"/> Female <input type="checkbox"/>	Home Address (if different):
Job Title*:	City/Town:
Department*:	State:
Designation:	Post Code:
Firm Name*:	Home Email*:
Business Address*:	Work Email:
PO Box Number:	Preferred Mailing Address: Work <input type="checkbox"/> Home <input type="checkbox"/>
City/Town:	Preferred Email Address: Work <input type="checkbox"/> Home <input type="checkbox"/>

2. Branch/Chapter Affiliation

Members of STEP must be affiliated with their local Branch or Chapter.

Details of Branches and Chapters can be found at www.step.org/branches-chapters

Please specify to which Branch or Chapter you wish to be affiliated:

3. Accreditation of Prior Certificated Learning (APCL)

Complete this section in order to apply for 30 Entry Level credits gained through APCL.

Applicants need to gain 60 credits at Entry Level (30 APCL plus 30 APEL) to qualify for Affiliate membership and be eligible to enrol on a STEP Diploma.

Details of Prior Certificated Learning

Name of primary qualification:

Awarding body:

Date of award:

For qualifications not listed in Appendix A, please include the length of study and level of qualification.

Length of study: years months

Level (if known):

Supporting evidence

Please provide verification and course details for the primary qualification you are proposing to use for APCL, and for any other relevant prior qualifications. Please attach a separate sheet if required.

Course details can be provided in the form of a link to the qualification web page.

4. Accreditation of Prior Experiential Learning (APEL)

Complete this section in order to apply for 30 Entry Level credits gained through APEL.

Please also attach an up-to-date CV/resume demonstrating your experience.

Details of Prior Experiential Learning

Employer(s):

Job role(s)/title(s):

Dates job(s) held:

In no more than 500 words, please provide details of your workbased experience relevant to trusts, estates and related activities.

This must represent a minimum one year of experience.

Please attach a separate sheet if required and/or to list additional employers.

5. Annual Affiliate Subscription Fee

Please visit www.step.org/fees for details of current fees.

Affiliate membership: Subscription Fee + APL Application Fee. You will be sent a request for payment when your membership is approved (pending payment) and not beforehand. Payment options will be listed on your request for payment.

You are required to submit payment within 30 days of being approved (pending payment) otherwise your membership will be suspended and you may need to formally re-apply.

9. Data Protection

The information you provide will be used by STEP, its subsidiary companies, STEP Branches/Chapters or approved agents for administrative and membership purposes or as required by law. Once you have provided your consent in the check box below, we will use your information to keep you up-to-date with news and developments in the industry, via both email and post. Our News Digest emails provide you with an overview of current news articles and reports relevant to your practice and region 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 STEP meetings and events for the months ahead.

We do not sell lists of our members, but, with your consent in the check box below, 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 partners. These companies may be based worldwide. This enables them to send you information about products and services that are relevant to your membership and are approved by STEP.

STEP also produces lists of STEP members available to the public. These lists appear on the public area of the STEP website. You will need to check the box below to confirm you would like your details to appear in the Online Directory.

IMPORTANT – PLEASE READ AND CHECK THE BOXES ACCORDINGLY
Please check the boxes below to provide your consent to receiving such messages by email, SMS and/or post from STEP, local STEP Branches/Chapters and other third parties approved by STEP.

Please note, that if you do not check either the box below relating to mailings or the box below relating to emails, then STEP will not be able to contact you regarding your membership and this could result in your membership lapsing. You will also be missing out on a number of member benefits if you do not give consent for STEP to mail or email you.

- I would like to receive mailings from STEP. (Please note that this includes the *STEP Journal*).
- I would like to receive emails from STEP. (Please note that this includes the STEP News Digests and all STEP member newsletters).
- I would like to receive SMS messages from STEP. (Please note that STEP will not charge you for any SMS messages sent to you).
- I would like to receive mailings (including emails) from third parties approved by STEP relating to products and services that are relevant to my membership.
- I would like to have my contact details appear on lists of STEP members that are available 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.

Background Check

STEP undertakes background checks using the Thomson Reuters World-Check One service to assist with determining an applicant's suitability for membership. Further information can be found at <https://risk.thomsonreuters.com/en/products/world-check-one-kyc-verification.html>

We may also contact other organisations to which you belong or have belonged and/or other authorities to obtain further information.

Please note that by submitting an application for membership, you are giving your consent for STEP to complete a background check.

The laws of England and Wales govern this Agreement and the parties submit to the exclusive jurisdiction of the English courts.

If you would like further information on how STEP uses your personal information, please refer to our privacy policy which can be found at www.step.org/privacy-policy-and-terms-use, or contact us at step@step.org

Appendix A

By way of guidance, some of the qualifications that meet the APCL requirements are:

- | | | |
|--|--|--|
| <input type="checkbox"/> AAT Accounting Qualification | <input type="checkbox"/> CISI | <input type="checkbox"/> IFSP |
| <input type="checkbox"/> ACA | <input type="checkbox"/> CFP | <input type="checkbox"/> Institute of Professional Will Writers |
| <input type="checkbox"/> ACAMS | <input type="checkbox"/> CLT Specialist Paralegal Qualification in Wills, Probate and Administration | <input type="checkbox"/> International Diploma in Financial Administration |
| <input type="checkbox"/> ACCA | <input type="checkbox"/> CPef | <input type="checkbox"/> Lawyer |
| <input type="checkbox"/> ACIB | <input type="checkbox"/> CTA | <input type="checkbox"/> MBA |
| <input type="checkbox"/> Advocate | <input type="checkbox"/> CMA | <input type="checkbox"/> Notary |
| <input type="checkbox"/> ATT | <input type="checkbox"/> Degree in law, accounting, finance, economics, business studies (PhD, Master's degree, University degree, College degree) | <input type="checkbox"/> PCIAM |
| <input type="checkbox"/> Bahamas Institute of Financial Services Trustee Diploma | <input type="checkbox"/> FINRA Series 7 | <input type="checkbox"/> RICS – Property, Finance and Investment pathway |
| <input type="checkbox"/> Barrister | <input type="checkbox"/> ICA Diploma in Compliance | <input type="checkbox"/> SOLAS qualification for Accountants in Scotland |
| <input type="checkbox"/> CII Financial Services Qualifications | <input type="checkbox"/> ICA Diploma in Governance, Risk and Compliance | <input type="checkbox"/> Solicitor |
| <input type="checkbox"/> CeFA | <input type="checkbox"/> ICSA | <input type="checkbox"/> SOLLA accreditation |
| <input type="checkbox"/> CFA | | |
| <input type="checkbox"/> CILEX, Level 6 | | |

For any questions, please email the STEP Worldwide Membership Department: step@step.org

Send your completed application form and accompanying documents to:

STEP, Artillery House (South), 11-19 Artillery Row, London, SW1P 1RT, UK

T: +44 (0)20 3752 3700 E: step@step.org W: www.step.org

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