

ACCREDITED EDUCATION PARTNER APPLICATION FORM - AUSTRALIA



For details of the criteria to join STEP as a Full Member (TEP) by way of accredited partner course modules, go to

www.step.org/join-australia/accredited-education-partners

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

For office use only

Membership No:

www.step.org

1. Personal Details *includes mandatory fields

Title (e.g. Mr/Ms/Mrs)*:	City*:
First Name(s)*:	State*:
Last Name*:	Postcode*:
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	Home Email*:
Gender: Male <input type="checkbox"/> Female <input type="checkbox"/>	Work Email:
Phone Number (incl. area code)*:	Preferred Mailing Address: Work <input type="checkbox"/> Home <input type="checkbox"/>
Mobile Number (incl. area code):	Preferred Email Address: Work <input type="checkbox"/> Home <input type="checkbox"/>
Home Address*:	

2. Branch/Chapter Affiliation

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

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

<input type="checkbox"/> New South Wales	<input type="checkbox"/> South Australia	<input type="checkbox"/> Victoria
<input type="checkbox"/> Queensland	<input type="checkbox"/> Tasmania	<input type="checkbox"/> Western Australia

3. Qualifications

Please tick the box(es) to show which qualifications you have and include a copy of your signed certificate(s).

<input type="checkbox"/> Qualified barrister	<input type="checkbox"/> Fellow of a Taxation Institute	<input type="checkbox"/> Institute of Chartered Secretaries and Administrators
<input type="checkbox"/> Qualified solicitor	<input type="checkbox"/> Fellow of a Banking Institute	<input type="checkbox"/> Other, please specify below:
<input type="checkbox"/> Chartered accountant	<input type="checkbox"/> Associate of a Taxation Institute	<input type="text"/>
<input type="checkbox"/> Certified accountant	<input type="checkbox"/> Associate of a Banking Institute	
<input type="checkbox"/> Fellow of the Institute of Legal Executives		

4. Accredited Modules

Please list all the STEP Accredited Partner Route modules completed.

Module:	Education Provider
1	1
2	2
3	3
4	4

5. Membership Category

4 modules from STEP accredited partner courses are considered equivalent to a STEP Diploma. Under STEP's Qualifications and Membership Framework (QMF), Affiliate members can apply to upgrade to Associate membership when 2 modules are completed, or, to Full membership when 4 modules and the PSA are completed, and where the experience requirement is met.

Full Membership

Has your occupation over the last two years included a significant involvement at a specialist level with one or more of the following: planning, creation, management of and accounting for trusts and estates, wealth administration, wealth advisory, executorship administration and related taxes? Yes

Please state the number of years of experience you have in the trusts and/or estates field:

years	months
-------	--------

Please attach to this form an existing CV/resumé (or a 500 word document) detailing your trusts and/or estates experience.

6. Declaration

Please ensure two separate declarations are completed.

One must be signed by a current Full STEP member. The other can be signed by your employer or an independent professional.

I confirm that the details given in section 5 are correct.

i	Full Name:	ii	Full Name:
	STEP Membership Number (if applicable):		STEP Membership Number (if applicable):
	Firm:		Firm:
	Phone Number (incl. area code):		Phone Number (incl. area code):
	Signature:		Signature:
Date	D D M M Y Y Y Y	Date	D D M M Y Y Y Y

7. Annual Membership Subscription Fee and TEP Registration Fee

Please visit www.step.org/fees for fees and administration fees.

You will be sent a request for payment for applicable fees when your membership is approved (pending payment). Payment options will be listed on your request for payment. You are required to submit payment within 30 days of being approved.

8. Applicant's Declaration

Please read the information below before signing this declaration.

I understand that as a STEP Member, I am represented by STEP throughout the world. In addition, my local STEP region and branch provide further support, benefits and services.

I confirm that I am aware of STEP's Memorandum and Articles of Association, its Standing Orders, the STEP Code of Professional Conduct and all other rules, regulations and guidance (and any amendments) that may be issued by STEP from time to time. I agree to abide by these, which together, are referred to as the "STEP Rules." These are published on the STEP website at www.step.org/central-governance

I confirm and acknowledge that if I breach any of these rules, disciplinary action may be taken against me that may result in a sanction being imposed which may affect my STEP membership, and that any sanctions and information relating to an investigation could be published in the *STEP Journal* in accordance with our Disciplinary Policy:

<http://www.step.org/sites/default/files/Policy/step-disciplinary-panel-publications-policy-june-2016.pdf>

I confirm that no prior or current criminal and regulatory proceedings have been brought against me by any authority, and that I will notify STEP should I become the subject of any criminal, regulatory or disciplinary investigation or other matter that has not already been brought to the attention of Professional Standards. I am aware that as STEP membership is a contract under English and Welsh law I am required to declare any criminal convictions under the provisions of the *UK Rehabilitation of Offenders Act 1974*. I understand that the *UK Rehabilitation of Offenders Act 1974* does not apply to the accountancy or legal profession, and therefore I may be required to disclose past convictions: that is any conviction

irrespective of its age and/or type. I understand that I cannot resign or lapse my STEP membership while an investigation is ongoing under the STEP Disciplinary Rules and that regardless of any such resignation and/or lapse, that STEP is entitled to investigate any complaints and make a determination as to my continued membership.

I understand that it is a requirement of STEP membership to ensure appropriate professional indemnity insurance (PII) is in place; therefore, I confirm that to the best of my knowledge and belief, I hold appropriate PII for the work which I undertake, or that as an employee, I am appropriately indemnified by my employer for the work I perform. Furthermore, I understand that if I make a declaration concerning PII which is subsequently found to be false, I will be subject to proceedings under the STEP Disciplinary Rules.

I agree to adhere to meet STEP's CPD requirements and record my CPD activities. I understand that random CPD audits are performed each year and that failure to respond to a request for a list of CPD activities I have undertaken may result in suspension of membership. Full details can be found at www.step.org/cpd

Signature:

Date

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

10. To be completed by Branch/Chapter only

For completion by Branch or Chapter Chair/Secretary/Membership Officer

I confirm that this applicant has/has not (delete as appropriate) been recommended for approval at Branch/Chapter level though I understand that ultimately, the Worldwide STEP Membership Committee approves those individuals who satisfy the criteria set out in the Admission Rules approved by the Board.

The reasons why we came to this conclusion, based on the applicant's qualifications and any knowledge we might have of the applicant are listed below:

<input type="text" value="Name:"/> <input type="text" value="Signature:"/> <input type="text" value="Comments:"/> <input type="text"/> <input type="text"/>	<input type="text" value="Branch/Chapter:"/> Date <input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

11. Practice Experience

Please select the practice area(s) that best match your current role. This information will be used in the Online Directory and will help STEP tailor its products and services to you.

<input type="checkbox"/> Anti-money laundering	<input type="checkbox"/> Family business	<input type="checkbox"/> Succession planning
<input type="checkbox"/> Charity formation/administration	<input type="checkbox"/> Family law	<input type="checkbox"/> Superannuation
<input type="checkbox"/> Company formation/management	<input type="checkbox"/> Family office	<input type="checkbox"/> Tax
<input type="checkbox"/> Compliance/regulation	<input type="checkbox"/> Insurance	<input type="checkbox"/> Trust planning/administration
<input type="checkbox"/> Contentious trusts and estates	<input type="checkbox"/> International client	<input type="checkbox"/> Wills and probate
<input type="checkbox"/> Cross-border estates	<input type="checkbox"/> Investment	<input type="checkbox"/> Other, please specify:
<input type="checkbox"/> Dispute resolution	<input type="checkbox"/> Philanthropy	<input type="text"/>
<input type="checkbox"/> Elderly and vulnerable clients	<input type="checkbox"/> Private banking	
<input type="checkbox"/> Estate planning/administration	<input type="checkbox"/> Rural family, business and agriculture	

12. Practice Focus

Please select the focuses that relate to the Practice Areas selected above. Please note that it will be assumed that all focuses will relate to all Practice Areas.

Civil Law
 Common Law
 Cross-Border
 Domestic/Local
 International

13. Profession

Please select the focuses that relate to the Practice Areas selected above. Please note that it will be assumed that all focuses will relate to all Practice Areas.

<input type="checkbox"/> Academic	<input type="checkbox"/> Financial Planner	<input type="checkbox"/> Notary
<input type="checkbox"/> Accountant	<input type="checkbox"/> Insurance Advisor	<input type="checkbox"/> Tax Advisor
<input type="checkbox"/> Banker	<input type="checkbox"/> Judge	<input type="checkbox"/> Trustee/Fiduciary
<input type="checkbox"/> Barrister	<input type="checkbox"/> Lawyer: Barrister/Advocate	<input type="checkbox"/> Trust Officer/Administrator
<input type="checkbox"/> Compliance Officer/Manager	<input type="checkbox"/> Lawyer: Solicitor/Attorney	<input type="checkbox"/> Wealth Manager
<input type="checkbox"/> Estate Planner	<input type="checkbox"/> Legal Assistant/Paralegal	<input type="checkbox"/> Will Writer

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

© 2018

STEP

Australia

ADVISING FAMILIES ACROSS GENERATIONS