

MEMBERSHIP UPGRADE FORM



All sections of this form must be completed.

You **MUST** complete a Professional Standards Awareness (PSA) case study before completing this form. Please visit www.step.org/professional-standards-awareness to complete now.

Incomplete application forms or those without a completed PSA case study will not be processed.

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

For office use only

Membership No:

www.step.org

Please read and complete the section below before submitting your application.

- I have completed a Professional Standards Awareness case study online at www.step.org/professional-standards-awareness
- I have attached to this form an existing CV/resumé (or 500 word document) detailing my trust and/or estate experience. See Section 2 for details.
- A declaration has been provided in Section 4. This was signed by a TEP in good standing, my employer or an independent professional.
- I understand that I must pay my applicable fees within 30 days of being tentatively approved. See Section 5 for details.
- I have signed and dated Section 6 and have agreed the permissions in Section 7.

1. Personal Details *indicates mandatory fields

Title (e.g. Mr/Mrs/Ms)*:	Country:
First Name(s)*:	Phone Number (incl. area code)*:
Last Name*:	Mobile 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	Home Address (if different):
Gender: Male <input type="checkbox"/> Female <input type="checkbox"/>	City/Town:
Job Title*:	County/State/Province:
Department*:	Post Code/Zip Code:
Designation:	Country:
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"/>
County/State/Province:	
Post Code/Zip Code:	

7. 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

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

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