

# STEP DIPLOMA IN TRUSTS AND ESTATES

## Scotland

**Enrolment Form: Please complete in BLOCK CAPITALS**

[www.cltint.com/course/step-scotland-diploma](http://www.cltint.com/course/step-scotland-diploma)

**In order to enrol on this course you must have obtained 60 Entry Level credits or currently be a STEP Member.**

See [www.cltint.com/stepentrylevel](http://www.cltint.com/stepentrylevel) for information.

### 1. Personal and Professional Details

CLTI Candidate Number (if applicable):

STEP Membership No. (if applicable):

Title (e.g. Mr/Mrs):

First Name(s):

Family Name(s):

Current Job Title:

Department:

Date of Birth (optional):

Gender:  Male  Female

Address:

Town: City:

Country:

Postcode:

Telephone Number (Preferred):

Telephone Number (Alternative):

Email (compulsory):

Confirmation of enrolment and course updates are sent via email so please ensure that your spam filter is disabled.

Dietary Requirements:

Disability Requirements:

#### Special Conditions

For details of how to make a special requirements application for the examination please contact us. Applications must be made at least 6 weeks prior to the examination.

#### Employer Details

Employer:

Employer Address:

Town: City:

Country:

Postcode:

Employer Contact Name:

Employer Contact Job Title:

Employer Contact Department:

Employer Contact Email:

Employer Contact Telephone No:

Do you want your employer to know that you are taking this course?

Yes  No

### 2. Employment Sector

If you are employed please select the description that best suits your current role:

- |   |  |
|---|--|
| <input type="checkbox"/> Academic                         | <input type="checkbox"/> Lawyer/Solicitor/Attorney         |
| <input type="checkbox"/> Accountant                       | <input type="checkbox"/> Legal Assistant/Paralegal         |
| <input type="checkbox"/> Banker                           | <input type="checkbox"/> Legal Executive                   |
| <input type="checkbox"/> Barrister                        | <input type="checkbox"/> Notary                            |
| <input type="checkbox"/> Client Relations/Marketing/Sales | <input type="checkbox"/> Probate Executive                 |
| <input type="checkbox"/> Compliance Officer/Manager       | <input type="checkbox"/> Secretarial/Administration        |
| <input type="checkbox"/> Corporate Administrator          | <input type="checkbox"/> Tax Advisor                       |
| <input type="checkbox"/> Estate Planner                   | <input type="checkbox"/> Trust Manager (Senior)            |
| <input type="checkbox"/> Financial Planner                | <input type="checkbox"/> Trust Officer/Trust Administrator |
| <input type="checkbox"/> Fund Administrator/Manager       | <input type="checkbox"/> Trustee/Fiduciary                 |
| <input type="checkbox"/> HR                               | <input type="checkbox"/> Wealth Management                 |
| <input type="checkbox"/> Insurance Advisor                | <input type="checkbox"/> Will Writer                       |
| <input type="checkbox"/> Judge                            | <input type="checkbox"/> None of the above                 |
| <input type="checkbox"/> Lawyer (Partner level)           |  |

### 3. Specialism(s) of interest

Please select the area(s) of specialisation which are of interest to you (choose as many as are relevant):

- |   |   |
|---|---|
| <input type="checkbox"/> Accounting                               | <input type="checkbox"/> Mediation                          |
| <input type="checkbox"/> Agricultural Property                    | <input type="checkbox"/> Mental Capacity                    |
| <input type="checkbox"/> Anti-Money Laundering                    | <input type="checkbox"/> Operations Management              |
| <input type="checkbox"/> Banking Law                              | <input type="checkbox"/> Pensions Law                       |
| <input type="checkbox"/> Capital Markets                          | <input type="checkbox"/> Personal Skills                    |
| <input type="checkbox"/> Charities – Formation and Administration | <input type="checkbox"/> Pharma                             |
| <input type="checkbox"/> Compliance                               | <input type="checkbox"/> Philanthropy                       |
| <input type="checkbox"/> Contentious Trusts/Estates               | <input type="checkbox"/> Portfolio Investment               |
| <input type="checkbox"/> Corporate Administration/Management      | <input type="checkbox"/> Private Equity and Property Funds  |
| <input type="checkbox"/> Cross-Border Estates                     | <input type="checkbox"/> Retail Funds                       |
| <input type="checkbox"/> Derivatives                              | <input type="checkbox"/> Risk Management                    |
| <input type="checkbox"/> Elderly Client                           | <input type="checkbox"/> Securities Clearing and Settlement |
| <input type="checkbox"/> Estate Administration                    | <input type="checkbox"/> Succession and Probate             |
| <input type="checkbox"/> Estate Planning                          | <input type="checkbox"/> Tax Investigations                 |
| <input type="checkbox"/> Executorship and Probate                 | <input type="checkbox"/> Taxation – Corporate               |
| <input type="checkbox"/> Family Business                          | <input type="checkbox"/> Taxation – International           |
| <input type="checkbox"/> Family Law                               | <input type="checkbox"/> Taxation – Personal                |
| <input type="checkbox"/> Financial Services                       | <input type="checkbox"/> Trust Accounting                   |
| <input type="checkbox"/> Foundations                              | <input type="checkbox"/> Trust Creation/Administration      |
| <input type="checkbox"/> Hedge Funds                              | <input type="checkbox"/> Wealth Planning                    |
| <input type="checkbox"/> Insurance                                | <input type="checkbox"/> Will Preparation                   |
| <input type="checkbox"/> Investments                              |   |

## 4. Course Selection

I wish to enrol on the following Advanced Certificate(s):

- Wills and Executries – Law and Practice**  
 **Trusts – Law and Practice**  
 **Taxation of Trusts and Estates**  
 **Trust and Executry Accounting**

Please indicate your chosen exam date (for available dates and workshop venues see [www.cltint.com/course/step-scotland-diploma](http://www.cltint.com/course/step-scotland-diploma)).

(Please note workshops take place alternately in Glasgow and Edinburgh and all examinations take place in Edinburgh).

Month \_\_\_\_\_ Year \_\_\_\_\_

### Distance Learning Course, Workshops and Examination £745 per paper (+ UK VAT)

(Please note that the course fee does not include the annual membership fee)

## 5. Payment Method

Please indicate whether you are self-funding or your employer is paying the fee (note that your distance learning material will not be dispatched until payment is received if you are self-funding):

- Self-funding                       Employer is paying

Employer signature if paying the course fee: \_\_\_\_\_

### Please tick the appropriate box

- Please invoice me at my home address  
 Please invoice my employer

### Please ensure all fields below are completed

Invoice contact name: \_\_\_\_\_

Invoice telephone number: \_\_\_\_\_

Employer VAT number: \_\_\_\_\_

I authorise you to debit my Credit Card  
 Card Type:     Master Card     Visa     Visa Debit

Name of Cardholder: \_\_\_\_\_

Credit Card Number:

Security Code:       Card Expiry Date:

Issuing Bank: \_\_\_\_\_

Payment Amount: £ \_\_\_\_\_

Signature of Cardholder: \_\_\_\_\_

Date:

I enclose a cheque/bankers draft made payable to Wilmington Shared Services Ltd

I have made an electronic bank transfer to:  
 Account Name: Wilmington Shared Services Ltd  
 Receipts Bank: Barclays Bank PLC  
 Sort Code: 202062  
 Account No: 63867870  
 Bank Swift: BARCGB22

Please supply a remittance advice with payments quoting the invoice number. All cheque payments to be made payable to Wilmington Shared Services Ltd and sent to Accounts receivable, 6–16 Underwood Street, London N1 7JQ, United Kingdom

## 6. Signature of Applicant

By signing this document, you confirm that you have read, understood, and agree to the terms and conditions of enrolment. These terms and conditions can be found at [www.cltint.com/course/step-scotland-diploma](http://www.cltint.com/course/step-scotland-diploma)

Signature of Applicant: \_\_\_\_\_

Date:

## 7. Data Protection

The information you have provided will be used by CLT International, STEP and its branches, or approved agents for administrative, membership and educational purposes or as required by law.

From time to time CLT International may pass your name and address to third parties to enable them to send you information about products and services approved by CLT International. If you do not want to receive hard copy mailings from third parties, please let us know by ticking the box.

I do not wish to receive hard copy mailings from third parties approved by CLT International relating to beneficial products and services.

CLT International will not share your email address with third parties without your express permission.

## 8. How did you hear about the course

- |   |   |
|---|---|
| <input type="checkbox"/> Colleague/Employer     | <input type="checkbox"/> STEP / Industry Event        |
| <input type="checkbox"/> Google/Search Engine   | <input type="checkbox"/> STEP Journal                 |
| <input type="checkbox"/> Mailshot               | <input type="checkbox"/> Financial Solutions Magazine |
| <input type="checkbox"/> Social Media           | <input type="checkbox"/> IFA Lifetalk                 |
| <input type="checkbox"/> STEP/CLT Website       | <input type="checkbox"/> Professional Paraplanner     |
| <input type="checkbox"/> STEP/CLT Email         |   |
| <input type="checkbox"/> Other (Please specify) |   |

## 9. STEP Application

**(Do NOT complete this section if you are already a STEP member)**

1. STEP will be notified of your enrolment within one month and your welcome e-mail from STEP Worldwide will be sent to you within 6 weeks.

Please note that it is mandatory to maintain your STEP membership whilst you are studying a STEP Certificate or Diploma and you will be invoiced by STEP for your annual fees.

For further details regarding membership categories, please visit [www.step.org/categories](http://www.step.org/categories)

2. Please indicate below the STEP Branch you wish to join:

(before completing this section, please refer to [www.step.org/branches-chapters](http://www.step.org/branches-chapters) for STEP branch details)

Please note that all members of STEP must comply with the Code of Professional Conduct.

This can be found by visiting [www.step.org/professional-standards](http://www.step.org/professional-standards)

### To return this form

#### By Post:

CLT International  
 Wrens Court, 52/54 Victoria Road  
 Sutton Coldfield, Birmingham  
 B72 1SX, England

**By Fax:** +44 (0) 121 362 75 10

**By Email:** [cltinternational@centlaw.com](mailto:cltinternational@centlaw.com)

