VISION, MISSION, VALUES
What they are and what they mean for us
Our first step in developing our next five-year strategy was to revisit our **Vision, Mission** and **Values**, to ensure that they support us in achieving our strategic priorities so we continue to grow and evolve.
Our new Vision is aspirational. It’s what we want to become.
Our Vision is to be globally recognised as setting the standard for those advising families across generations.
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Double meaning: Alludes to our role in setting standards of education, best practice, ethics, etc; and being the best at what we do.

Speaks to our strategic priority of raising our profile through thought leadership.

What connects our members.
Our new Mission clearly sets out what we do, and why we do it.
Our mission is to inspire confidence in families planning their assets across generations by setting and upholding high professional standards, informing public policy, promoting education, and connecting practitioners globally to share knowledge and best practice.
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VALUES

They are our guiding principles
They bind us together and set us apart
They are central to our culture as an organisation
Together with our Mission and Vision, they give clarity to who we are and what we stand for.

We have developed four new core values, drawing on our history, our purpose and our ambitions...
COMMUNITY
We respect each other and value diversity.

Community is core to STEP. Our membership crosses geographical, racial, professional, cultural and many other boundaries, but at its heart is a shared interest and a respect for what each person brings. Our diversity is our biggest strength, providing fresh perspectives and original thinking that drives us forward.
To volunteer for STEP you need to be prepared to work as a team. It may mean hard work and extra hours in addition to your job, but you will forge relationships with people who will become lifelong friends, and the rewards of what you could achieve are immeasurable.

Adele Perrot TEP, Guernsey
COLLABORATION
We work together and learn from each other to find new and better ways of doing things.

From its earliest days, STEP’s purpose has been to connect people to enable the sharing of knowledge and best practice. Through collaboration, we have found new and better ways of working, learning from each other to benefit individuals, their firms, their clients and the profession more broadly.
Estates and trusts are globally becoming more interconnected, and unquestionably a growth market that requires specialist expertise. This entails working with other professionals on client matters, interpreting tax law and resolving complex and challenging matters.

Ian Raspin TEP, Australia
We are honest, open and committed to upholding our ethical and professional standards.

As a professional body, STEP is dedicated to maintaining and developing clear professional and ethical standards to provide confidence and reassurance to families. Our people (members, staff and volunteers) are required at all times to act with integrity and in a manner that inspires the respect and trust of colleagues, clients and the wider community. As an organisation, STEP is committed to doing what’s right, acting in the public interest with openness and honesty.
In my practice, I have had occasion to advise not just the first generation, but the second and third generations of the same family. It’s been very satisfying to know that giving proper advice in the early years, as well as continual assessment and adjustments as legal, regulatory and tax regimes change, has spared the families much grief, stress and cost, as well as preventing disputes.

Sim Bock Eng TEP, Singapore
CONTINUOUS LEARNING
We champion continued learning and development to build the knowledge and skills necessary to deal with a rapidly-changing business environment.

Education is at the heart of STEP. We champion continued professional development for our people to keep us at the forefront of our professions, and work to improve public and policymakers’ understanding of the issues families face in planning for their futures, developing guidance and support.

CONTINUOUS LEARNING
Undoubtedly compliance and the ever-changing regulations are the main challenges facing us, as well as understanding different cultures and legal requirements in other jurisdictions. Research and nonstop thirst for learning is the key.

Nicky Xenofontos TEP, Cyprus

CONTINUOUS LEARNING
Our Values underpin everything we do.

To be globally recognised as setting the standard for those advising families across generations.

COMMUNITY / COLLABORATION / INTEGRITY / CONTINUOUS LEARNING