

# MEMBERSHIP UPGRADE FORM

All sections of this form must be completed.

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

For office use only

Membership No:

www.step.org

## 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:	

## 2. Experience and Qualifications

### Upgrade to TEP

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, executorship administration and related taxes?  Yes

**Please attach to this form an existing CV/resumé (or a 500 word document) detailing your trust and/or estate experience over the last two years. Applications without an attached CV/resumé will not be processed.**

### 3. 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](http://www.step.org/branches-chapters)

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

### 4. Independent Declaration

To be completed only by employer, independent professional, or a TEP in good standing.

I confirm that the details given in section 2 are correct.

Full Name:					
STEP Membership Number: (If applicable)					
Firm/company:					
Phone Number (incl. area code):					

Signature:

Date

D	D	M	M	Y	Y	Y	Y
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### 5. Annual Membership Subscription Fee and TEP Registration Fee

Please visit [www.step.org/fees](http://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.**

### 6. 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](http://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](http://www.step.org/cpd)

Signature:

Date

D	D	M	M	Y	Y	Y	Y
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## 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. 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 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.

Please note that by submitting this application form, you will be indicating 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. If you do not want to receive this kind of information from STEP and/or third parties, please let us know by ticking the relevant box.

STEP also produces lists of STEP members available to the public. These lists appear on the public area of the STEP website. If you do not wish your contact details to appear in these lists, please tick the relevant box.

- I do not wish to receive mailings from STEP. (please note that this includes the *STEP Journal*).
- I do not wish to receive emails from STEP (please note that this includes the STEP News Digests and all STEP member newsletters).

- I do not wish to receive SMS messages from STEP (please note that STEP will not charge you for any SMS messages sent to you).
- I do not wish to receive mailings (including emails) from third parties approved by STEP relating to products and services that are relevant to my membership.
- I do not wish to have my contact details appear on lists of STEP members that are issued to the public or appear on the public area of the STEP website.

**Upon approval, STEP members can update their personal details or mailing preferences at any time by logging into the STEP website.**

**For non-members, please contact us at [step@step.org](mailto:step@step.org) for any changes to personal details or preferences.**

**Background Check** - STEP undertakes background checks using the Refinitiv World-Check One service to assist with determining an applicant's suitability for membership. Further information can be found at <https://www.refinitiv.com/en/products/world-check-kyc-screening/world-check-one-kyc-verification>

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-notice](http://www.step.org/privacy-notice), or contact us at [step@step.org](mailto:step@step.org)

For any questions, please email the STEP Worldwide Membership Department:  
**[step@step.org](mailto:step@step.org)**

**Send your completed application form and accompanying documents to:**

STEP, Artillery House, 11-19 Artillery Row, London, SW1P 1RT, UK  
T: +44 (0)20 3752 3700 E: [step@step.org](mailto:step@step.org) W: [www.step.org](http://www.step.org)

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