

# REJOINING STEP MEMBERSHIP

All sections of this form must be completed. Incomplete application forms will not be processed.  
Please keep a photocopy of this form and allow up to six weeks for us to process your application.  
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)*:	Telephone Number (incl. area code)*:
Family 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"/> Non-Binary <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:	Please select your previous STEP membership category:
Post Code/Zip Code:	Full <input type="checkbox"/> Associate <input type="checkbox"/> Affiliate <input type="checkbox"/>

## 2. 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:

### 3. Experience and Qualifications

Please tick the box(es) to show which qualifications you have.

STEP Diploma

STEP Essay Route

STEP accredited education programme, please specify:

Other, please specify:



**I have included a copy of my signed certificate(s) for the above qualifications (this is required to process your application)**

Please state the number of years of experience you have in the trust and/or estate field:

years       months

**I have attached my CV/résumé to this form detailing my trust and/or estate experience (this is required to process your application)**

### 4. Annual Membership Subscription Fee and Rejoining Fee

Please visit [www.step.org/fees](http://www.step.org/fees) for details of current fees.

STEP requires you to pay the following fees:

1. a rejoining administration fee,
2. payment for the current membership year.

You will be sent a request for payment for applicable fees when your membership is approved (pending payment) and not beforehand. Payment options will be listed on your request for payment.

**You are required to submit payment within 30 days of being approved (pending payment) otherwise your membership will be suspended and you may need to formally re-apply.**

### 5. Independent Declaration

To be completed only by employer, independent professional, or current full STEP member.

I confirm that the details given in section 3 are correct.

Full Name:

STEP Membership Number:          
(If applicable)

Firm/company:

Phone Number (incl. area code):

Signature:

Date

Length of professional acquaintance with the applicant:  
 years       months



## 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)

## 8. Practice Areas

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"/> Charity formation/administration      | <input type="checkbox"/> Elderly and vulnerable clients | <input type="checkbox"/> Private banking                     |
| <input type="checkbox"/> Civil-law planning (incl foundations) | <input type="checkbox"/> Estate planning/administration | <input type="checkbox"/> Rural family & business agriculture |
| <input type="checkbox"/> Company formation/management          | <input type="checkbox"/> Family business                | <input type="checkbox"/> Tax                                 |
| <input type="checkbox"/> Compliance/regulation                 | <input type="checkbox"/> Family office                  | <input type="checkbox"/> Tax planning/administration         |
| <input type="checkbox"/> Contentious trusts & estates          | <input type="checkbox"/> Insurance                      | <input type="checkbox"/> Will and probate                    |
| <input type="checkbox"/> Cross border estates                  | <input type="checkbox"/> Investment                     |  |
| <input type="checkbox"/> Dispute resolution                    | <input type="checkbox"/> Philanthropy                   |  |

## 9. 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.

- |                                       |  |   |
|---------------------------------------|--|---|
| <input type="checkbox"/> Civil Law    | <input type="checkbox"/> International | <input type="checkbox"/> Domestic/Local |
| <input type="checkbox"/> Cross-Border | <input type="checkbox"/> Common Law    |   |

## 10. Profession

Please select from the following information which will be used in the Online Directory and STEP Directory and Yearbook.

- |   |   |  |
|---|---|--|
| <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                 |

## 11. Firm Type

Please select from the following information which will be used in the Online Directory.

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Academic Institution                 | <input type="checkbox"/> Charity            | <input type="checkbox"/> Legal             |
| <input type="checkbox"/> Accountant                           | <input type="checkbox"/> Consultant         | <input type="checkbox"/> Tax Advisors      |
| <input type="checkbox"/> Alternative Business Structure (ABS) | <input type="checkbox"/> Family Office      | <input type="checkbox"/> Trust Company     |
| <input type="checkbox"/> Bank/Private Bank                    | <input type="checkbox"/> Financial Advisors | <input type="checkbox"/> Wealth Management |
| <input type="checkbox"/> Chambers                             | <input type="checkbox"/> Insurance          | <input type="checkbox"/> Will Writing      |

Send your completed application form and accompanying documents by email to [step@step.org](mailto:step@step.org)

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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