

# USA MEMBERSHIP

## Application Form



For office use only  
Membership No:

www.step.org

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

For use only by persons practicing and resident in the United States.

All sections of this form must be completed. Incomplete application forms will not be processed.

You will be required to complete a Professional Standards Awareness Case Study within your first year of membership. You can learn more about this at [www.step.org/professional-standards-awareness](http://www.step.org/professional-standards-awareness). You will be able to access the PSA section of the website once you have been issued your login details.

Please keep a photocopy of this form and allow eight to ten weeks for us to process your application.

- I have attached an existing CV/resumé (or 500 word document) detailing my trust and/or estate experience. See Section 2 for details.
- Two separate declarations have been provided in Section 5. These were signed by a current Full STEP member, employer or independent professional, not from the same employer.
- I understand that I must pay my applicable fees within 30 days of being tentatively approved. See Section 6 for details.
- I have signed and dated Section 7 and have agreed the permissions in Section 8.

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

1. Personal Details		*Indicates mandatory fields
Title (e.g. Mr/Mrs)*:	<input type="text"/>	
First Name(s)*:	<input type="text"/>	
Last Name*:	<input type="text"/>	
Date of Birth:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female	
Job Title*:	<input type="text"/>	
Department*:	<input type="text"/>	
Degrees/Professional Designations (e.g. CPA,JD):	<input type="text"/>	
Firm Name*:	<input type="text"/>	
Business Address*:	<input type="text"/>	
PO Box Number:	<input type="text"/>	
City/Town:	<input type="text"/>	
State:	<input type="text"/>	
Zip Code:	<input type="text"/>	
Work Email*:	<input type="text"/>	
Telephone Number (incl. area code):	<input type="text"/>	
Cell Number (incl. area code):	<input type="text"/>	

1. Personal Details (continued)	
Home Address (if different):	<input type="text"/>
City/Town:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
Home Email:	<input type="text"/>
Preferred Mailing Address	<input type="checkbox"/> Work <input type="checkbox"/> Home
Preferred Email Address	<input type="checkbox"/> Work <input type="checkbox"/> Home

2. Experience and Qualifications	
<b>For Full Membership</b>	
Has your occupation over the last five 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? <input type="checkbox"/> Yes	
<b>For Associate membership</b>	
Has your occupation over the last two to five 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? <input type="checkbox"/> Yes	
Please state the number of years of experience you have in the trust and/or estate field: _____ years _____ months	
Please attach to this form an existing CV/resumé (or a 500 word document) detailing your trust and/or estate experience over the last five years for Full membership, or two to five years if applying for Associate membership. Applications without an attached CV/resumé will not be processed.	



## 8. Data Protection

The information you provide will be used by the Society, 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 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 Society 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 opposite.

The Society also produces lists of STEP members for issue to the public (i.e. the STEP Directory & Yearbook and Online Directory). These lists appear on the public area of the STEP website. If you do not wish your contact details to appear on these lists please tick the relevant box below.

- 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 all STEP email 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.

### Background Check

STEP undertakes background checks using the Thomson Reuters World-Check One service to assist with determining 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 to STEP carrying out a background check. The laws of England and Wales govern this Agreement and the parties submit to the exclusive jurisdiction of the English courts.

- I give my consent for STEP to undertake any background check as deemed necessary. I understand and accept that any information obtained may be considered by the Membership Committee and STEP (and its representatives) to determine my suitability for membership.
- I agree to provide STEP with further information about the nature of any results if requested to do so.

STEP members can update their email and mailing preferences at any time by logging into the STEP website.

If you would like further information on how STEP uses your personal information please refer to our Privacy Policy at [www.step.org/privacy-policy-and-terms-use](http://www.step.org/privacy-policy-and-terms-use) or contact us at [step@step.org](mailto:step@step.org)

### 9. How did you hear about STEP?

Please select one of the following or detail below:

- |  |   |  |   |
|--|---|--|---|
| <input type="checkbox"/> Colleague/Employer  | <input type="checkbox"/> STEP email                     | <input type="checkbox"/> STEP conference or event                    | <input type="checkbox"/> CLT International            |
| <input type="checkbox"/> STEP member         | <input type="checkbox"/> STEP website                   | <input type="checkbox"/> Industry publication (please specify) _____ | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> STEP Journal        | <input type="checkbox"/> Employer Partnership Programme |  |   |
| <input type="checkbox"/> STEP branch/chapter |   |  |   |

### 10. 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.

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

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

### 12. 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"/> Estate Planner             | <input type="checkbox"/> Lawyer: Solicitor/Attorney | <input type="checkbox"/> Trust Officer/Administrator |
| <input type="checkbox"/> Accountant                 | <input type="checkbox"/> Financial Planner          | <input type="checkbox"/> Legal Assistant/Paralegal  | <input type="checkbox"/> Wealth Manager              |
| <input type="checkbox"/> Banker                     | <input type="checkbox"/> Insurance Advisor          | <input type="checkbox"/> Notary                     | <input type="checkbox"/> Will Writer                 |
| <input type="checkbox"/> Barrister                  | <input type="checkbox"/> Judge                      | <input type="checkbox"/> Tax Advisor                |  |
| <input type="checkbox"/> Compliance Officer/Manager | <input type="checkbox"/> Lawyer: Barrister/Advocate | <input type="checkbox"/> Trustee/Fiduciary          |  |

### 13. Firm Type

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

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