

STEP Qualified Practitioner

An entry route to STEP Membership for trust & estate practitioners who have established themselves in their field.



Counted towards your SRA CPD requirement

“Being a ‘self-taught’ rather than class and exam based route suited the point in my career that I had reached. It’s the qualification to have in this industry!”

Lindsay Luttermann, Senior Counsel, Walkers



A distance learning alternative to the STEP Diploma.

About this Route

The STEP Qualified Practitioner (QP) Route to membership provides a professional qualification recognised by the industry. It allows experienced practitioners to demonstrate their knowledge in order to gain Full STEP Membership.

This route is entirely distance learning based with candidates completing their own research. To obtain Full membership and the recognised TEP qualification, candidates must successfully complete three papers within a four year period.

Through writing comprehensive papers on subjects assigned by STEP, Qualified Practitioner students demonstrate their theoretical and practical knowledge of Law, Accounts & Administration, Taxation and International Issues.



“One great benefit of the Qualified Practitioner Route was the ability to write one essay per year over a three year period, which meant that I could space my essays out and lodge them at a leisurely pace!”

Gavin McEwan LLB(Hons), DipLP, NP, TEP, Partner and Deputy Head of the Charities Legal Team, Turcan Connell

Enhance your Career

- Arm yourself with a qualification recognised by everybody working in the private client community and become a Full Member of STEP.
- Completing the Qualified Practitioner Route will both demonstrate commitment to your professional development and add significant value to your professional practice.
- Be part of a worldwide network of professionals specialising in tax, trusts and estate planning.
- Provide your clients with assurance that you are a highly qualified trust and estate practitioner and trusted advisor.
- Research topics in depth which have relevance to your everyday practice.

Find out more about how QP membership has benefited your contemporaries at www.step.org/careers

Benefits to Employers

- By employing a Qualified Practitioner student, you will be employing somebody who is studying for an academic and professional qualification recognised by the industry.
- Full Members of STEP are the leading lights in the field of trusts and estates.
- The TEP designation will give your clients confidence and peace of mind that the practitioner has reached the exacting standards required.
- Develop the organisation's reputation: TEPs are considered the experts in the field of trusts and estates and the private client departments of the leading firms have a significant TEP presence.
- Qualified Practitioner students can research and write their papers around their work commitments.

Course Structure and Assessment

1. QP students research, prepare and submit three papers of between 2,500 and 3,000 words in length on a subject selected from those published on the STEP Website. The purpose of these papers is to demonstrate a level of knowledge acceptable to the Society.
2. A panel of adjudicators assesses each paper. Results are issued directly by STEP Worldwide in August each year.
3. All three papers must be passed within four years of becoming a Student Member of the Society. Upon successful completion of this course of study, candidates are eligible to apply for Full Membership of STEP, which includes the right to use the TEP designation.

The QP route runs on an annual cycle:

July – topics are published on the STEP Website.

July - November – decide which paper(s) to complete.

30 November – register your chosen topics and submit related payment.

November - April – research and write your chosen paper(s).

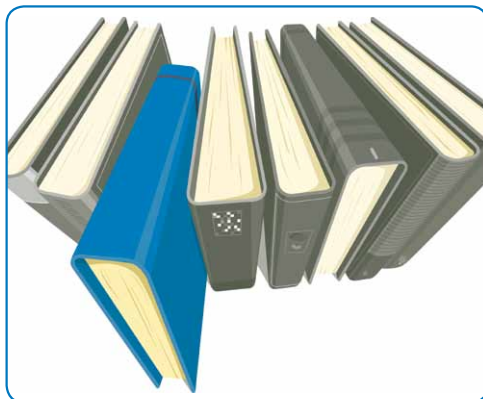
30 April – submit your completed paper(s).

August – results are issued.

The level required of the papers submitted is equivalent to Masters Degree level and should be of a quality equivalent to a published article in a professional journal.

A maximum of one question from each of the following topic areas can be chosen:

- Law
- Accounts & Administration
- Taxation
- International Issues



The topic questions can be found on the STEP website at www.step.org/qptopics. They are updated each year and differ depending on the jurisdiction. If your jurisdiction is not listed, please contact the STEP Membership Department by e-mailing step@step.org

About STEP

STEP is a unique professional body, the leading representative and training body for solicitors, accountants and other professionals who specialise in trusts and estate planning. STEP provides members with local, national and international learning and business network focusing on the responsible stewardship of assets today and across the generations.

Education is at the forefront of STEP's purpose, which is to raise and promote standards in technical knowledge and in service to the public. Completing the Qualified Practitioner will both demonstrate commitment to your professional development and add significant value to your professional practice.

“Being a STEP member enables me to keep up to date with all developments and current affairs in the Trust/Wealth Management world via the daily emails, press releases etc. The STEP seminars organized locally also help significantly.”

Bhooshan Heerah, FCCA TEP, Manager, Stonehage S.A



Entry Requirements

To be eligible for this route to membership you need to have one of the following:

- A recognised professional qualification and two years' trust and estate post-qualification experience.
- A vocational degree and five years' trust and estate work experience.
- Ten years' trust and estate work experience.

Cost and How to Apply

Visit www.step.org/qp to download a QP Application Form.

The following fees are payable with your QP Application Form:

- QP Application Fee
- Annual Student Subscription Fee

An Examiners Fee is payable when you submit your Thesis Registration Form.

To see current fees please visit www.step.org/fees

Successful completion of the Qualified Practitioner Route leads to Full Membership of STEP entitling you to a range of benefits including the use of the designation TEP, attendance at STEP networking events, STEP Special Interest Groups and a subscription to the STEP Journal . Find out how STEP membership will benefit you at www.step.org/memberbenefits

For full details of the Qualified Practitioner Route to membership visit www.step.org/qp

For details of all STEP programmes visit www.step.org/pd

Please note:

Every effort has been taken to ensure that this publication was accurate at the time of going to press but STEP is not liable for any errors or omissions in this publication.