

AFFILIATE APPLICATION FORM

For office use only.
Membership No:

www.step.org

Please read and complete the section below before submitting your application. This form is to be completed by those looking to join via Accreditation of Prior Learning (APL) rather than enrolling on a STEP qualification.

All sections of this form must be completed. Incomplete application forms or those without payment of the annual membership fee will not be processed.

All membership application forms must be sent to:
Membership Department
STEP
Artillery House (South)
11-19 Artillery Row
London SW1P 1RT, UK

I have completed all details required to apply for Accreditation of Prior Certificated Learning (APCL) credits, have attached evidence of my qualification (i.e. photocopy of certificate) and have included syllabi for qualifications not confirmed as meeting APCL requirements.

I have attached a cheque or included credit/debit card details for payment or made payment by BACS.

I have completed all details required to apply for Accreditation of Prior Experiential Learning (APL) credits and have attached an up-to-date CV demonstrating my experience.

I have signed and dated Section 6.

Visit www.step.org/qualifications to learn more about STEP's Qualifications and Membership Framework (QMF).

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

1. Personal Details

*Indicates mandatory fields

Title (e.g. Mr/Mrs)*: _____

First Name(s)*: _____

Family Name*: _____

Date of Birth:

Gender: Male Female

Job Title*: _____

Department*: _____

Designation: _____

Firm Name*: _____

Business Address*: _____

PO Box Number: _____

City/Town: _____

County/State/Province: _____

Post Code/Zip Code: _____

Country: _____

Work Email*: _____

1. Personal Details (continued)

Telephone Number
(incl. area code): _____

Mobile Number
(incl. area code): _____

Home Address (if different): _____

City/Town: _____

County/State/Province: _____

Post Code/Zip Code: _____

Country: _____

Home Email: _____

Preferred Mailing Address Work Home

Preferred Email Address Work Home

2. Branch/Chapter Affiliation

Affiliate members must be affiliated to their local branch or chapter. Please specify which branch or chapter you wish to be affiliated to:

Details of branches and chapters can be found at www.step.org/branches-chapters

3. Accreditation of Prior Certificated Learning

Complete this section in order to apply for 30 Entry Level credits gained through APCL.

Applicants need to gain 60 credits at Entry Level (**30 APCL plus 30 APEL**) to qualify for Affiliate membership.

Details of Prior Certificated Learning

Qualification(s) upon which your claim is based:

Awarding body:

Name and Date of Award:

Please go to Section 4 if you have a recognised qualification. See Appendix A

What was the duration of the course (from enrolment to final examination/assignment submission)?

Approximately how many study hours were involved and how were these spent (e.g. face-to-face teaching, personal study)?

If there was an assignment/coursework component, describe the type of question set (e.g. case study) and state how many words were required.

If there was an examination component, describe the length of the examination and the type(s) of question asked, e.g. discursive essay-style questions, legal problem-solving scenarios, tax computations, MCQs, etc.

Supporting evidence

Please provide verification that this and any other relevant prior qualification(s) (please attach a separate sheet if required) has/have been obtained as well as the syllabi for those qualifications.

Syllabi are not required for qualifications already confirmed as meeting APCL requirements. See Appendix A

4. Accreditation of Prior Experiential Learning

Complete this section in order to apply for 30 Entry Level credits gained through APEL.

Details of Prior Experiential Learning

Employer:

Address:

Town/City:

County/Country:

Postcode/Zip:

Industry sector:

Department:

Job role/title:

Dates job held:

Reported to (job title):

Key job responsibilities (between 3-5):

- _____
- _____
- _____
- _____
- _____

For each job role held within the relevant period (one year minimum):

– briefly list the core activities carried out under each job responsibility (as listed above)

– describe what you have learnt in these areas and what you are able to do

Please attach a separate sheet if required and/or to list additional employers.

Referee

This section must be completed in full and signed and dated by your chosen referee. Your referee should have known you in a professional capacity during the relevant period and have supervised your work or be a STEP member. He or she is confirming your competence as detailed above.

I can confirm that (Name): _____
has proven his/her technical competence as detailed in this form.

Signature:

Date:

Name:

Job title:

Professional Relationship to Applicant:

Company/Business Name:

Email:

Telephone Number:

STEP membership number (if applicable):

5. Annual Affiliate Subscription Payment

The annual Affiliate subscription is payable with this form.
 For details of fees visit www.step.org/fees

Please tick the appropriate box

- I am applying in STEP Basel and have not enclosed payment, as I will be invoiced by the local branch in CHF.
- I enclose a cheque for _____ drawn on a British bank/bankers draft/international money order made payable to STEP.
- I have enclosed a foreign currency cheque for \$/€ _____ made payable to STEP.

BACS Remittance

- I have made payment by BACS and quoted my name in my payment reference.
 For bank details please email accounts@step.org
 NOTE: When paying by BACS all bank charges must be covered.

Date of BACS transfer:

Amount transferred: _____

Transfer made by (account name): _____

- I authorise you to debit my Maestro/Visa/MasterCard/American Express (delete as appropriate)

Name of cardholder: _____

Credit card number: _____

Card expiry date:

Card start date:

Issue no.(Maestro only):

Date:

Signature of cardholder: _____

Applications without payment will not be processed.

6. Applicant's Declaration

Please read and complete the four sections below before signing this declaration.

- I confirm that the information given in this form is true and accurate to the best of my knowledge and belief. Accordingly, I hereby make application to the Board of Directors of the Society to be admitted to membership, and I authorise the Board to make such enquiries concerning this application as it deems necessary.
- I have read and understood the Society's Code of Professional Conduct and Constitutional Framework and accept the authority of the Society to enforce its rules and regulations as issued from time to time. I am aware that the current documents are published and are available via the Society's website www.step.org and that if I am breach of any of the Code, the rules or regulations, disciplinary action could be taken which may result in suspension or exclusion of my membership and/or other sanctions being imposed, including a costs penalty.
- I further confirm that I have not been subject to any criminal, disciplinary or other matters which may breach the STEP Professional Code of Conduct that have not already been brought to the attention of STEP's Professional Standards team. 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 that I may be required to disclose spent convictions; that is any conviction irrespective of its age and/or type.
- I undertake to pay such subscriptions as are levied by the Board of Directors of the Society and all other monies owed by me to the Society or any of its parts.

Signature: _____

Date:

7. 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 Affiliates, 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 partner. This includes overseas companies based outside the European Union (for example, companies based in the US and Canada) to enable 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 below.

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 Affiliates that are issued to the public or appear on the public area of the STEP website.

Affiliates of STEP 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 which can be found on our website, or contact us at step@step.org.

Appendix A

By way of guidance, some of the qualifications that meet the APCL requirements are:

- AAT Accounting Qualification
- ACA
- ACCA (Foundation and Diploma)
- ACIB
- Advocate (in recognition of the professional qualifications required to achieve this status)
- ATT
- Bahamas Institute of Financial Services Trustee Diploma
- Barrister (in recognition of the professional qualifications required to achieve this status)
- CII Financial Services Qualification (Certificate, Diploma, Advanced Certificate and Advanced Diploma)
- CFA
- CMA
- CISI Wealth/Retail (Qualifying/Advanced/professional)
- CISI Compliance/Risk (Qualifying/Advanced/professional)
- CISI Capital Markets (Qualifying/Advanced/professional)
- CISI Operations (Qualifying/Advanced/professional)
- CFP
- CLT Specialist Paralegal Qualification in Wills, Probate and Administration
- CTA
- Degree in law, accounting, finance, economics, business studies (PhD, Master's degree, University degree, College degree)
- FINRA Series 7
- ICA Diploma in Compliance
- ICA Diploma in Governance, Risk and Compliance
- ICSA (Chartered, Diploma, Advanced Certificate, Certificate (offshore paper only))
- ILEX Probate and Succession papers, Level 6
- Institute of Professional Will Writers Entry Examination
- International Diploma in Financial Administration
- Lawyer (in recognition of the professional qualifications required to achieve this status)
- MBA
- Notary (in recognition of the professional qualifications required to achieve this status)
- RICS – Property, Finance and Investment pathway
- SOLAS qualification for Accountants in Scotland
- Solicitor (in recognition of the professional qualifications required to achieve this status)
- SOLLA accreditation