



## STEP Diploma for Canada and Student Membership Enrolment Form

**Please ensure you complete all areas and include the following:**

- A detailed resume
- Photocopy of professional designation certificate(s)
- Payment
- All necessary signatures, dated

**Upon completion of this form please send by mail to:**

**STEP Canada**  
Attention: Member Services  
1 Richmond Street West, Suite 700  
Toronto, Ontario M5H 3W4

### 1. Personal and Employment Details

#### *Personal Details*

Title (i.e. Mr. Mrs. Ms.): \_\_\_\_\_  
 First Name: \_\_\_\_\_  
 Family Name: \_\_\_\_\_  
 Gender:  Male  Female  
 Date of Birth: DD/MM/YYYY \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Tel Number: \_\_\_\_\_  
 Mobile Number: \_\_\_\_\_  
 E-mail: \_\_\_\_\_

#### *Employment Details*

Firm Name: \_\_\_\_\_  
 Occupation: \_\_\_\_\_  
 Industry: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Tel Number: \_\_\_\_\_  
 Fax Number: \_\_\_\_\_  
 E-mail: \_\_\_\_\_

*This address will be used for the online STEP Directory and the STEP Yearbook and is where your course materials will be sent.*

*If any of the information you have listed above changes, please remember to update it at [www.step.ca](http://www.step.ca).*

**Are you already a student member of STEP Canada?**

Yes  No

If Yes, please provide your student number below and continue to course registration (Section 3). Student #: \_\_\_\_\_

If No, please continue on to apply for student membership.

**If you are a QP Student**, confirm your wish to transfer to the Diploma route by checking here

### 2. Registration as a STEP Canada Student

#### **How did you hear about STEP?**

- |   |  |
|---|--|
| <input type="checkbox"/> Colleague/Employer                           | <input type="checkbox"/> STEP INSIDE         |
| <input type="checkbox"/> <a href="http://www.step.ca">www.step.ca</a> | <input type="checkbox"/> STEP Member         |
| <input type="checkbox"/> STEP conference or event                     | <input type="checkbox"/> Print advertisement |
| <input type="checkbox"/> Other  |  |

**When applying for STEP student membership you must include the following with your application:**

- Current resume outlining your involvement, if any, in the trust and/or estate fields.
- A photocopy of your professional designation certificate(s), if any.

#### **Branch Selection**

Please specify which branch you wish to be affiliated with:

- |                                    |                                   |                                   |
|------------------------------------|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> Atlantic  | <input type="checkbox"/> Calgary  | <input type="checkbox"/> Edmonton |
| <input type="checkbox"/> Montreal  | <input type="checkbox"/> Ottawa   | <input type="checkbox"/> Toronto  |
| <input type="checkbox"/> Vancouver | <input type="checkbox"/> Winnipeg |                                   |

#### **Applicant's Declaration**

I agree to be bound by STEP Canada's Code of Professional Conduct, By-Laws and Branch regulations. I confirm that the details given in this application form are correct and that I am a fit and proper person to be admitted as a member of the Society. Accordingly, I hereby make application to STEP Canada to be so admitted. I authorize STEP Canada to make such enquires concerning this application as they deem necessary. I undertake to pay such subscriptions as may be levied by STEP Canada and I understand that my acceptance as member is conditional on this.

Signature: \_\_\_\_\_

Date: DD/MM/YYYY \_\_\_\_\_



## STEP Diploma for Canada and Student Membership Enrolment Form

### 2. Registration as a STEP Canada Student Cont'd

#### Data Protection

The information you provided will be used by the Society, its subsidiary companies, STEP Branches or approved agents for administrative and membership purposes or as required by law. It is impossible to run the membership scheme without sending administrative mailings to you. In addition you will receive mailings relating to membership benefits which typically consist of the STEP Journal, The STEP Membership Directory and details of conferences organized by STEP, its Branches and STEP Conferences.

The Society takes its responsibility to protect the personal details of Members very seriously and only approves mailings that it believes will be relevant to your membership and where there will be a tangible benefit e.g. discounts. If you do not want to receive this kind of information from third parties, please let us know by ticking box 1 below. If you tick this box we will not share your details with third parties in this way.

The Society also produces lists of STEP Members in any requested locality (e.g. by postal code) for issue to the public. This service proves particularly popular following coverage by the media. If you do not wish your contact details to appear on these lists please tick box 2 below.

- I do not wish to receive mailings from third parties approved by STEP relating to beneficial products and services.
- I do not wish my details to appear on lists of STEP Members issued to the public.

### 3. Course Enrolment

Please select the course you wish to enrol in:

- Law of Trusts - \$850.00 + applicable taxes
- Taxation of Trusts & Estates - \$850.00 + applicable taxes
- Wills, Trust & Estate Administration \$850.00 + applicable taxes
- Trust & Estate Planning (Not yet available)

To apply for a course exemption from a Diploma course, please complete the Exemption Application form found at [www.step.ca](http://www.step.ca).

Please select either of the next two examination dates:

- May                       October

We recommend you allow 4 – 6 months of study time before the exam date.

I agree that in making a successful application for course and examination entry I accept that I am bound by the STEP Diploma for Canada Examination Rules and Regulations as may be posted at [www.step.ca](http://www.step.ca) from time to time. I acknowledge that STEP reserves the right to vary or cancel an examination where the occasion necessitates, and that STEP accepts no liability if, for whatever reason, a course or examination does not take place.

Signed: \_\_\_\_\_

Date: DD/MM/YYYY \_\_\_\_\_

### 4. Payment of fees

Please select the applicable fees for your application:

- Student membership application - \$200.00 + applicable taxes
- Law of Trusts - \$850.00 + applicable taxes
- Taxation of Trusts & Estates - \$850.00 + applicable taxes
- Wills, Trust & Estate Administration \$850.00 + applicable taxes
- Trust & Estate Planning (Not yet available)

#### Credit Card Details

Name on Card: \_\_\_\_\_

Credit card number: \_\_\_\_\_

Card expiry date: MM/YYYY \_\_\_\_\_/\_\_\_\_\_

Payment amount: \$ \_\_\_\_\_

Please choose a payment method:

- I enclose a cheque made payable to STEP Canada
- I authorize you to debit my Visa/MasterCard

Signature of cardholder: \_\_\_\_\_

Date: \_\_\_\_\_

*Payments of your student membership fee and course fee will be processed on acceptance of your application. All fees are set by STEP Canada and are subject to change without notice.*