



STEP Canada Diploma Affiliate/Technician Enrolment Form

Please ensure you complete all areas and include the following:

- A detailed resume
- Photocopy of your professional designation certificate(s), if any
- Payment for annual affiliate/technician fees and course registration
- All necessary signatures, dated

On completion of this form please send to:

STEP Canada
Attention: Education
45 Sheppard Avenue East, Suite 510
Toronto, Ontario M2N 5W9

Or email to:

education@step.ca

1. Enroll as a STEP Canada Affiliate/Technician

Are you already enrolled in the STEP Diploma Program?

- Yes No

If Yes, please provide your STEP number below and continue to Section 4. #: _____

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

How did you hear about STEP?

- | | |
|---|--|
| <input type="checkbox"/> Colleague/Employer | <input type="checkbox"/> STEP Inside |
| <input type="checkbox"/> www.step.ca | <input type="checkbox"/> STEP Member |
| <input type="checkbox"/> STEP conference or event | <input type="checkbox"/> Print advertisement |
| <input type="checkbox"/> Other _____ | |

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"/> London & SWO | <input type="checkbox"/> Montreal | <input type="checkbox"/> Okanagan |
| <input type="checkbox"/> Ottawa | <input type="checkbox"/> Saskatchewan | <input type="checkbox"/> Toronto |
| <input type="checkbox"/> Vancouver | <input type="checkbox"/> Winnipeg | |

Applicant's Declaration

I agree to be bound by 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 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 affiliate/technician status and/or other sanctions being imposed, including a costs penalty. 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 an affiliate/technician 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 is conditional on this.

Signature: _____

Date: DD/MM/YYYY _____

2. 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; the STEP Yearbook; and the address 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.



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3. Data Protection

The information you provided will be used by the Society, its subsidiary companies, STEP Branches and Chapters, or approved agents for administrative and benefit purposes or as required by law. It is impossible to run the activities and programs without sending administrative mailings to you. One of the benefits of STEP affiliate/technician status is receiving important electronic communications, such as industry news, notices of educational events, submissions to government, continuing education credits, and member-related news from STEP Canada. In order to keep sharing this information with you, we must obtain your consent to receive electronic communications under Canada's anti-spam legislation.

The Society takes its responsibility to protect the personal details of its affiliates, technicians and members very seriously. Please provide your consent to the following options:

- I want to receive emails from STEP Canada.
- I want my contact details to appear in the online directory accessible by the public.
- I want my contact details to be included in the published member directory issued annually to all members worldwide.
- I wish to receive mailings from third parties approved by STEP relating to beneficial products and services.

4. Course Enrolment

Please select the course you wish to enrol in:

- Law of Trusts
- Taxation of Trusts & Estates
- Wills, Trust & Estate Administration
- Trust & Estate Planning

Please select either of the next two examination dates:

- May November

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 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 _____

5. Payment of Fees

Please select the applicable fees for your application:

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Law of Trusts - \$850 (+ taxes) <input type="checkbox"/> Taxation of Trusts and Estates - \$850 (+ taxes) <input type="checkbox"/> Wills, Trusts and Estate Administration - \$850 (+ taxes) <input type="checkbox"/> Trusts and Estate Planning - \$850 (+ taxes) | <ul style="list-style-type: none"> <input type="checkbox"/> Annual fee - \$200 (+ taxes calculated on 50% of fees) <p>Please choose a payment method</p> <ul style="list-style-type: none"> <input type="checkbox"/> I enclose a cheque made payable to STEP Canada <input type="checkbox"/> I authorize you to debit my Visa / MasterCard / AMEX |
|--|---|

Name on card: _____

Card number: _____ Expiration: _____

Signature of Cardholder: _____

* All fees are set by STEP Canada and are subject to change without notice.