



STEP Qualified Practitioner Student Enrolment Form

Complete and send this form to join STEP Canada as a Student Member progressing through the Qualified Practitioner route. Include the following with your application:

- Current CV/Resume outlining your involvement in the trust and/or estate fields.
- Photocopy of your professional designation certificate(s)
- Payment for membership fees

On 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: _____ Fax 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
 If any of the information you have listed above changes, please remember to update it at www.step.ca.*

2. Qualifications and Experience

1. Please tick the box(es) to show which qualifications you have and include a copy of your signed certificate(s)

- | | |
|--|---|
| <input type="checkbox"/> LL.B. | <input type="checkbox"/> MTI (Member, Trust Institute) |
| <input type="checkbox"/> Quebec Notary | <input type="checkbox"/> FCSI (Fellow of the Canadian Securities Institute) |
| <input type="checkbox"/> A financial planning designation
(CFP, PFP, RFP, Pl. Fin. From IQPF) | <input type="checkbox"/> An insurance designation (ChFC, CLU) |
| <input type="checkbox"/> Other, please specify _____ | <input type="checkbox"/> One of the major accounting designations: _____ |

2. Please state the number of years of experience you have: _____ years _____ months

Have you ever been involved with any professional misconduct, criminal proceeding or regulatory sanctions? YES/NO

If yes, please provide full details attached to this form.

3. Please attach to this form a CV/Resume detailing your trust and/ or estate experience (500 words or more) over the past five years.



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3. Professional Experience

To apply for student membership via the Qualified Practitioner route you must have a minimum of two (2) years post qualification practical experience in trusts and/or estates related matters.

1. Please state the amount of your qualifying experience: _____ years
2. For what periods of your career have you practised in trusts and estates (T&E)? Please show from 2008 to date. This information may be detailed in your CV/Resume if you prefer.
3. What proportion (%) of your working time is spent currently on each of the following:

_____ Trust taxation	_____ Offshore trusts
_____ Trust administration, taxation and accounts	_____ Charity formation
_____ Trust formation	_____ Management of a trust and estate practice
_____ Executorship and probate planning	_____ Wills and estate planning

(An applicant should normally be spending at least 50% of his or her time on these matters. It is not expected that an applicant will have worked in all fields of practise.)
4. Briefly describe the nature of your current workload, in terms of the scale and complexity of the client matters or other work that you are handling.

4. Branch Affiliation

Members of STEP must be affiliated with their local branch. Please specify which branch you wish to be affiliated with.

Please choose from Vancouver, Calgary, Edmonton, Winnipeg, Toronto, Ottawa, Montreal or Atlantic Provinces

5. Payment of Fees

Please provide payment details for the Student Membership Fee in the amount of \$200*
(*plus applicable tax calculated on 50% of total)

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

Name on card: _____

Credit Card number: _____ - _____ - _____ - _____

Expiration: _____/_____ Payment amount: _____

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



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5. Declaration. To be completed only by employer, independent professional, or current Full STEP Member

I confirm the details given in sections two (2) and three (3) are correct.

Full Name: _____ Telephone: _____

STEP Membership Number (if applicable): _____ Firm: _____

Signature: _____ Date: DD/MM/YYYY _____

6. Essay Submission

PLEASE NOTE the essay rules that can be found on the STEP website (www.step.ca)

- Essays can only be accepted if they are between 2,500 and 3,000 words in length and must be submitted in English or French.
- Essays must follow the specified format, use the current year essay topics* and include payment of the relevant fee.
- They are submitted electronically via the Essay Submission Form, which can be found on the STEP website.
- Essays will be marked twice annually with cut-off dates applicable on May 1 and October 1 each year.

Note that as of May 1, 2011 the applicable essay submission fee will be \$375.00 plus tax

*New essay topics are posted after the May 1st cut-off date and are valid for the subsequent calendar year.

7. 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 Canada
1 Richmond Street West, Suite 700
Toronto, ON
M5H 3W4

Telephone: 416-491-4949 Fax: 416-491-9499
Toll Free: 1-877-991-4949 E-mail: memberservices@step.ca

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 organised by STEP, its Branches and STEP Conferences. There will often be a discount on conference delegate fees for STEP members.

From time to time STEP may pass your details to local STEP branches and other third parties, including 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 approved by STEP. 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 postcode) 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.