



## STEP Canada Qualified Practitioner Enrolment Form

Complete and send this form to join STEP Canada as an affiliate 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 annual affiliate fees

**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. Personal and Employment Details

#### Personal Details

First Name: \_\_\_\_\_ Family Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Date of Birth: DD/MM/YYYY \_\_\_\_\_ Gender:  Male  Female Mr./Mrs./Ms.: \_\_\_\_\_

#### Employment Details

Firm Name: \_\_\_\_\_  
 Occupation: \_\_\_\_\_ Industry: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Desk Phone: \_\_\_\_\_ Fax Number: \_\_\_\_\_  
 Email: \_\_\_\_\_

**\*\*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](http://www.step.ca).**

If you are already enrolled in the STEP Canada Diploma program, please provide your STEP number : \_\_\_\_\_

#### How did you hear about STEP?

- Colleague / Employer       STEP INSIDE       www.step.ca       STEP Member  
 STEP conference or event       Print advertisement       Other: .....

### 2. Qualifications

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

- |   |   |
|---|---|
| <input type="checkbox"/> LLB, LLM, JD   | <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"/> Financial planning designation (CFP, CIM, RFP, PFP, PIFin) | <input type="checkbox"/> Insurance designation (CLU)                        |
| <input type="checkbox"/> Other, please specify:<br>_____                            | <input type="checkbox"/> Accounting designations (CPA, CA, CGA, CMA)        |
|   | <input type="checkbox"/> Financial Investment designations (CFA, ChFC)      |

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.



## STEP Canada Qualified Practitioner Enrolment Form

### 3. Professional Experience

To enroll as an affiliate via the qualified practitioner route you must have a minimum of three (3) years post qualification practical experience in trusts and/or estate related matters.

1. Please state the amount of your qualifying experience: \_\_\_\_\_ years

2. 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.)

3. 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. Please show details for the last three years; this information may be detailed in your CV/resume if you prefer.

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### 4. Branch/Chapter Affiliation

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

Atlantic

Calgary

Edmonton

London & Southwestern Ontario

Montreal

Okanagan

Ottawa

Saskatchewan

Toronto

Vancouver

Winnipeg

### 5. Payment of Fees

Please provide payment details for the annual fee in the amount of \$200, plus applicable taxes on 50% of the fee.

I enclose a cheque made payable to STEP Canada

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.



## STEP Qualified Practitioner Affiliate Enrolment Form

### 6. 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 \_\_\_\_\_

### 7. Essay Submission

**PLEASE NOTE** the essay rules that can be found on the STEP website ([www.step.ca](http://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.

**The applicable essay submission fee is \$375.00 plus tax**

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

### 8. 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 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 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 \_\_\_\_\_

### 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 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.

STEP Canada  
45 Sheppard Avenue East, Suite 510  
Toronto, ON  
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[www.step.ca](http://www.step.ca)

Telephone: 416-491-4949  
Toll Free: 1-877-991-4949

Fax: 416-491-9499  
E-mail: [education@step.ca](mailto:education@step.ca)