



# STEP EXPLAINED

[www.step.org](http://www.step.org)

**STEP**   
ADVISING FAMILIES ACROSS GENERATIONS

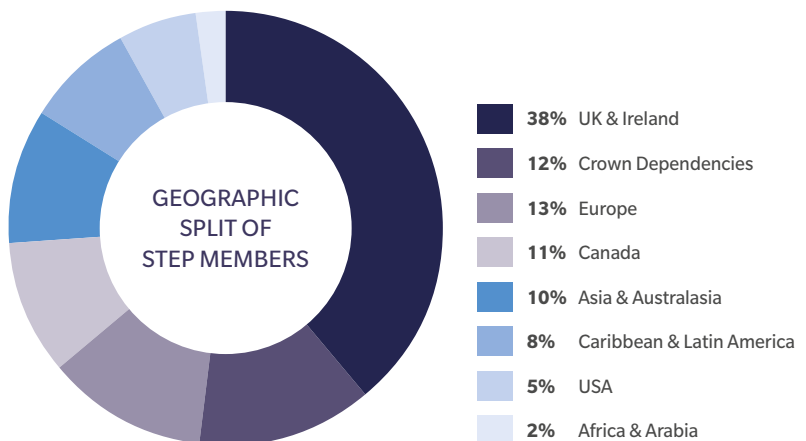
## STEP EXPLAINED

STEP is the worldwide professional association for those advising families across generations. We help people understand the issues families face in this area and promote best practice, professional integrity and education to our members.

## STEP ACROSS THE WORLD

Today we have more than 20,000 members across 95 countries from a range of professions, including lawyers, accountants and other specialists.

All STEP members belong to a branch or chapter that provides professional development and opportunities to meet with other practitioners in their region. We have over 100 branches and chapters across the world.



## LEADING THE FIELD

STEP members are experts in their field, and our network allows them to connect with people who work in their specialist area all around the world.

To aid this we have a number of Special Interest Groups, including mental capacity; family business; philanthropy; cross-border estates; charities; and contentious trusts and estates. These groups offer an opportunity for members to exchange ideas, develop their knowledge, and advance the practice of these specialist areas.

For example, STEP members can play a key role in advising their clients on how to undertake philanthropic giving in an effective way. Our Philanthropy Advisors Special Interest Group was therefore set up to help establish, report on and promote the business case for philanthropy advisory services.

Similarly our Mental Capacity Special Interest Group was established in recognition of the increasing importance of issues concerning capacity to the work of many STEP members. Changing demographics and the reality of an ageing population where many of us will live for many years in various stages of diminished capacity is pushing incapacity planning to the fore. With members from all over the world, the group provides an international forum of support, education and assistance to practitioners undertaking all aspects of legal work for clients of all ages who are affected by a lack of mental capacity.

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## TRAINING AND DEVELOPMENT

Our main focus is on training and development. More than 4,000 individuals worldwide are currently studying for STEP qualifications. We offer a number of qualifications, from entry-level programmes to advanced certificates and diplomas.

STEP qualifications are widely recognised and fully qualified STEP members, identified by the letters TEP after their name, are highly valued by employers.

We actively assist continuing professional development among our members through resources and opportunities for sharing knowledge, including publications, special interest groups, and national and international conferences and seminars.

## PROFESSIONAL STANDARDS

All of our members are subject to an extensive Code of Professional Conduct, requiring them at all times to act with integrity and in a manner that inspires the confidence, respect and trust of their clients and of the wider community. Our members are also required to keep up-to-date with the latest legal, technical and regulatory developments.

These defined professional standards provide the public with a clear understanding of what to expect from a STEP member, as well as recourse to lodge a complaint with STEP if a member is not acting in accordance with these standards.

## WHAT OUR MEMBERS DO

Our members work with families, helping them with real problems. Some examples of what our members advise on are:

- providing for an individual following their partner's death, while protecting the interests of their children
- ensuring elderly or vulnerable relatives are cared for and supported
- helping families with interests spread across the world to be compliant with the laws and tax rules of different countries
- ensuring that a family business will pass safely from one generation to another
- helping clients to support charitable causes in an effective way.

In their professional practice, STEP members often help people at difficult points in their lives, such as after the death of a close family member. To help consumers, we have produced a range of free leaflets, written by experts, on topics ranging from 'What to do when somebody dies' to 'Why make a will?'.

A photograph of a young child with curly brown hair, wearing a white shirt, resting their head on the shoulder of an adult wearing a blue and white plaid shirt. The background is softly blurred with warm, bokeh light spots.

These leaflets can be found at  
[www.step.org/leaflets](http://www.step.org/leaflets)

# PROTECTING FAMILIES' INTERESTS

We take a leading role in explaining our members' views and expertise to governments, tax authorities, regulators and the public.

We have consistently campaigned for issues of importance to families: from improving standards in will writing and clarifying the legal and practical uncertainties in care-home funding, to the development of fair, transparent and consistent tax rules to give families the confidence to make long-term plans. We also work to defend families' right to legitimate confidentiality in their financial affairs and to protect their information from risk of abuse.

We therefore work closely with governments and regulatory authorities to highlight the impact of any proposed changes to legislation and provide technical support and advice where appropriate.

We maintain a 'Consultation Tracker' on our website listing all public consultations of interest to STEP members that are currently open or on which STEP has provided a response.

This leaflet as well as other informational leaflets are available to view and order at [www.step.org/leaflets](http://www.step.org/leaflets)

For more information about STEP please visit our website [www.step.org](http://www.step.org)

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