

# Raising standards, promoting trust and helping families

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STEP is a global professional body, comprising lawyers, accountants, trustees and other practitioners that help families plan for their futures.

Our mission is to inspire confidence in families planning their assets across generations by setting and upholding high professional standards, informing public policy, promoting education, and connecting practitioners globally to share knowledge and best practice.

Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience.



## Acting with integrity to inspire trust

- All STEP members are expected to abide by the STEP Code of Professional Conduct, which sets out the key ethical and professional standards they should uphold.
- STEP has a clear disciplinary process for investigating any potential breaches of the Code of Professional Conduct.

### Raising standards through education and best practice

- STEP offers a broad range of qualifications and resources to support its members' continuing professional development.
- STEP works with policymakers and regulatory authorities across the world to examine the likely impact on families of policy proposals and to develop guidance and support.
- STEP provides educational resources for the public to help them better understand key issues relating to family inheritance and succession planning.

### Internationally recognised experts

- The TEP designation is recognised by employers in 96 countries.
- Of STEP's 21,000 members, 14,000 are fully qualified TEPs.
- STEP accreditation is recognised by many governments, regulators and international bodies.
- TEPs have access to an extensive global network of specialist practitioners, enabling them to share knowledge and expertise across professional and geographic boundaries.

## Helping families

STEP members are from a variety of professions, including accountancy, banking, financial advice, law, tax advice and trust administration.

Some examples of what STEP members may advise on are: providing for an individual following his or her 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 laws and tax rules of different countries; ensuring that a family business will pass safely from one generation to another; and helping clients to support charitable causes effectively.

### Regional membership

