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# Strategic View

Simon Hodges, Director of Profession

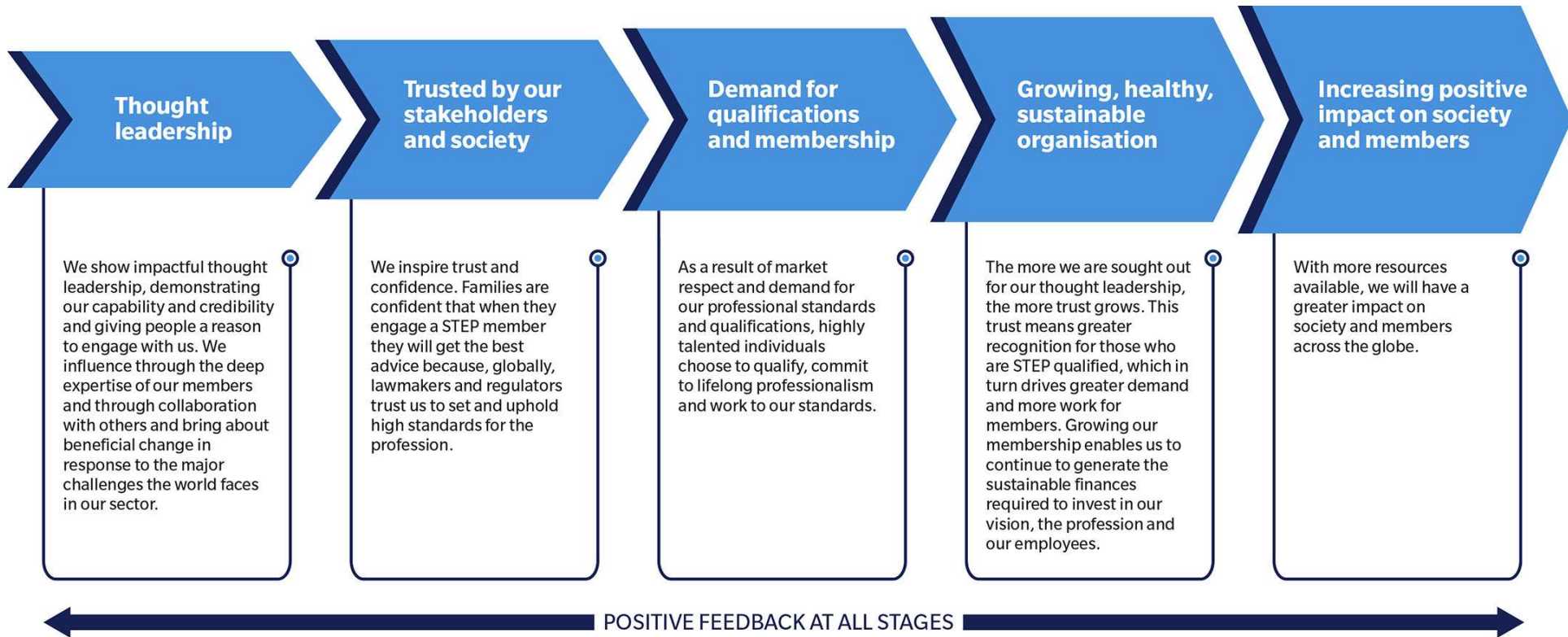
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Celebrating 30 years



# Steps to growth and impact

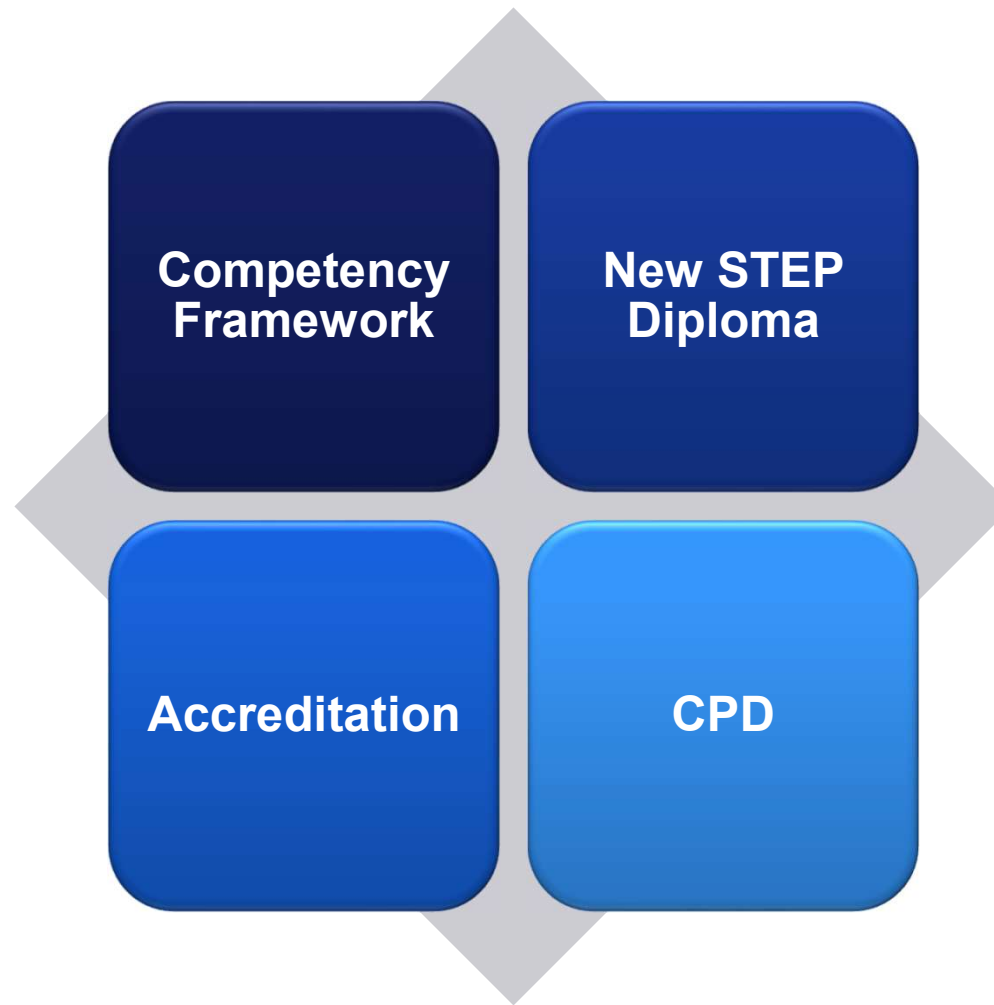


# Vision and Values

**Our Vision is to be globally recognised as setting the standard for those advising families across generations**

**/**COMMUNITY **/**COLLABORATION **/**INTEGRITY **/**CONTINUOUS LEARNING

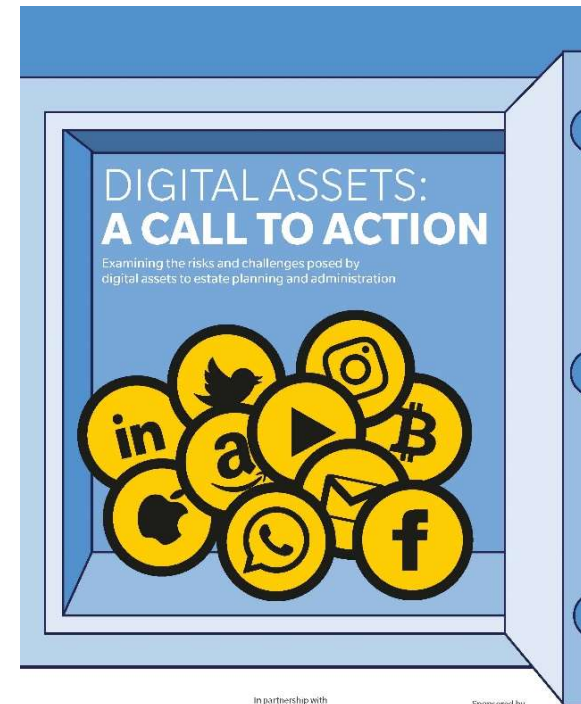
# Strategic priorities: Education



# Strategic priorities: Thought leadership



## FAMILY DIALOGUES ON THE RESPONSIBLE STEWARDSHIP OF WEALTH: **A GUIDE**





# Strategic priorities: Markets and sectors



# Strategic priorities: Diversification of income



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2021

Three routes to membership:

- Exam Route
- Essay Route
- Expertise Route

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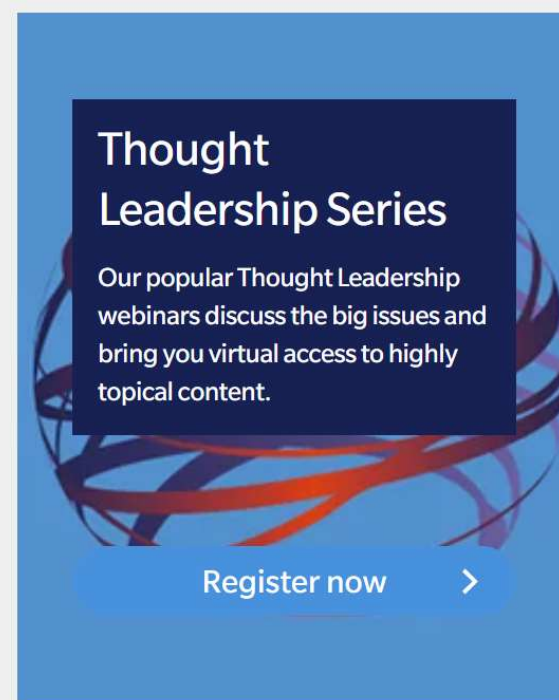
**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS



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**87%**

rate STEP  
membership  
as excellent  
or good

**75%**

believe that  
membership  
has helped  
progress their  
career

**85%**

agreed that  
membership  
demonstrates their  
commitment to  
high professional  
standards

**90%**

agreed that  
membership helped  
keep them up to  
date with industry  
developments and  
changes in policy  
and legislation

**+54**

Net Promoter  
Score

**Education = number one priority**

# Equality, Diversity & Inclusion



# Working together

