

/COMMUNITY /COLLABORATION /INTEGRITY /CONTINUOUS LEARNING



Celebrating 30 years





Steps to growth and impact

Thought leadership

Trusted by our stakeholders and society

Demand for qualifications and membership

Growing, healthy, sustainable organisation

Increasing positive impact on society and members

We show impactful thought leadership, demonstrating our capability and credibility and giving people a reason to engage with us. We influence through the deep expertise of our members and through collaboration with others and bring about beneficial change in response to the major challenges the world faces in our sector.

We inspire trust and confidence. Families are confident that when they engage a STEP member they will get the best advice because, globally, lawmakers and regulators trust us to set and uphold high standards for the profession.

As a result of market respect and demand for our professional standards and qualifications, highly talented individuals choose to qualify, commit to lifelong professionalism and work to our standards.

The more we are sought out for our thought leadership, the more trust grows. This trust means greater recognition for those who are STEP qualified, which in turn drives greater demand and more work for members. Growing our membership enables us to continue to generate the sustainable finances required to invest in our vision, the profession and our employees.

With more resources available, we will have a greater impact on society and members across the globe.

POSITIVE FEEDBACK AT ALL STAGES



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**



STEP.





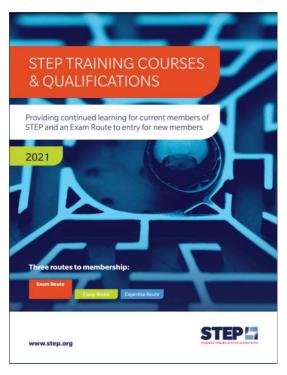


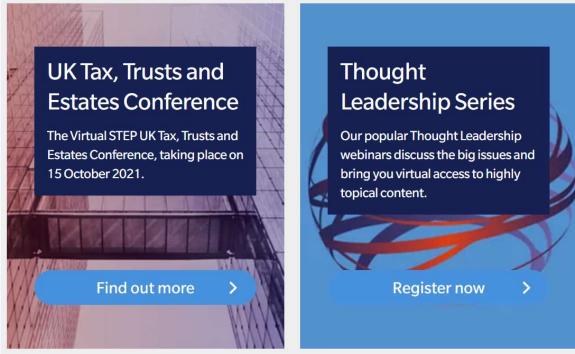
Strategic priorities: Markets and sectors





Strategic priorities: Diversification of income







7-8 JULY 2022, LONDON





STEP GLOBAL CONGRESS 2022

Why attend?

- Experience and participate in presentations and debates that discuss the big issues facing the trusts and estates profession
- Be there when we identify future trends
- Return to face-to-face networking with the world's leading advisors and influential speakers.

Secure your place today at congress.step.org

What our members are telling us

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

