





CONNECT. LEARN. ACHIEVE

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



STEP's Vision and Mission

The 2023-26 strategy remains focused on the Vision that will drive us forward:

To be globally recognised as setting the standard for those advising families across generations.

This is supported by our Mission that sets out clearly what we do and why we do it:

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.



Long term strategic priorities

1. Excelling in education

2. Raising our profile

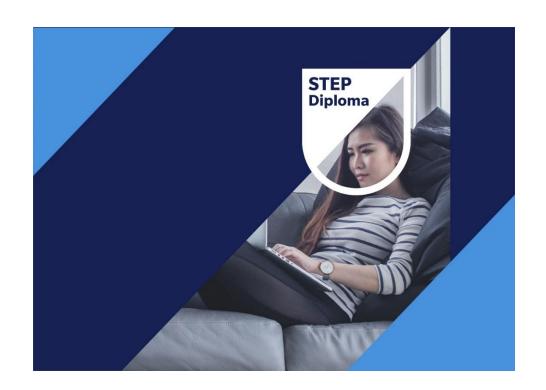
3. Increasing value to members

4. Empowering our people



Excelling in Education

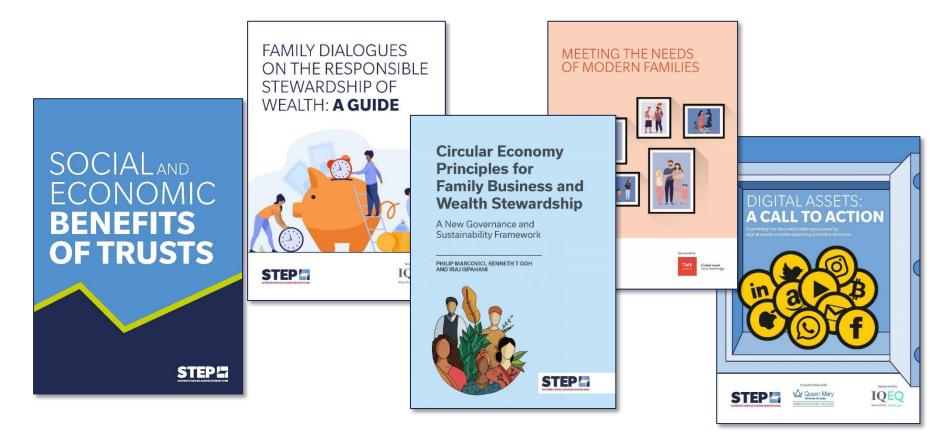
STEP's qualifications and education resources will become the global benchmark for the industry





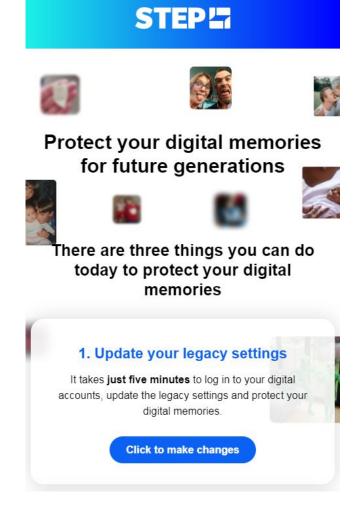
Raising our Profile

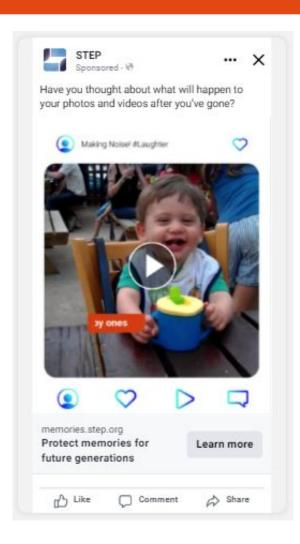
STEP will be a world-leading authority on chosen topics with our expertise sought by policymakers, regulators, media and other stakeholders





'Digital Memories' campaign









Increasing Value to Members

The value we create for members will encourage them to advocate and recommend STEP, leading to organic growth

84%

rate STEP membership as 'excellent' or 'good' 84%

rate STEP as 'excellent' or 'good' at promoting education 91%

rate STEP as
'excellent' or
'good' at setting and
upholding standards

92%

say STEP helps them keep up to date with industry developments +47

Net Promoter Score



Empowering our People

We will create an environment where all our people, regardless of background or personal circumstance, feel valued and included





Working together



