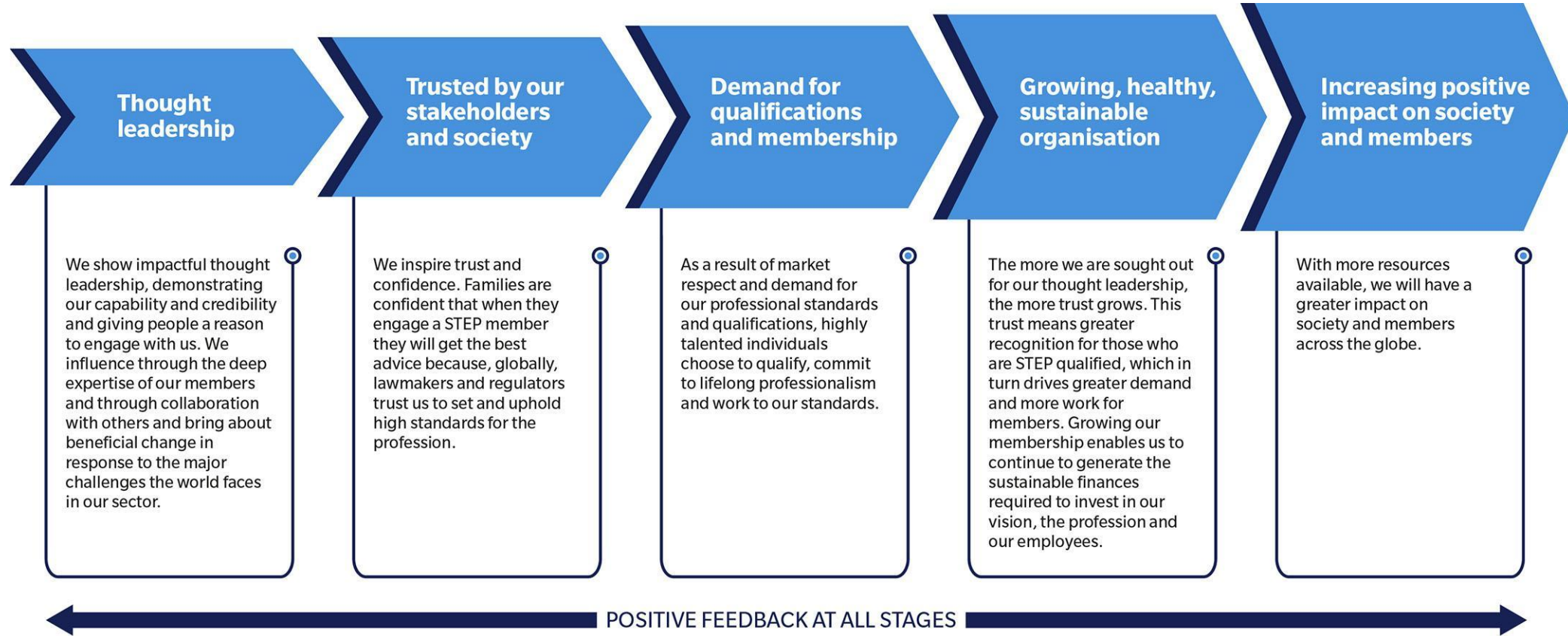


Strategic View

Kelly Greig, Worldwide Board

 COMMUNITY  COLLABORATION  INTEGRITY  CONTINUOUS LEARNING

CONNECT. LEARN. ACHIEVE



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

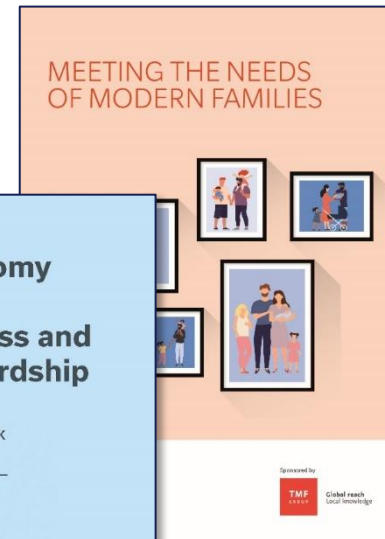
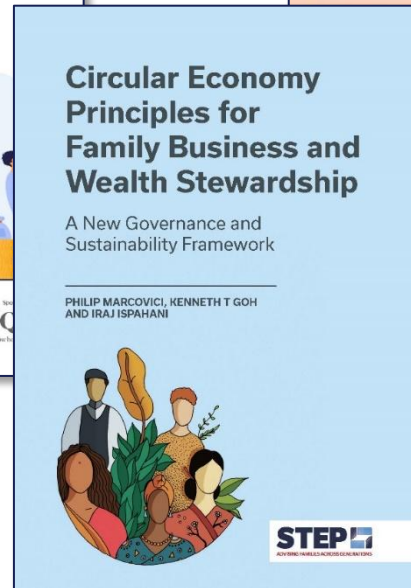
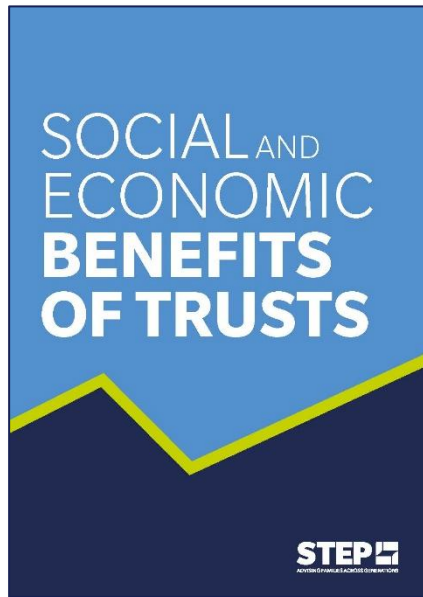
Excelling in Education

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



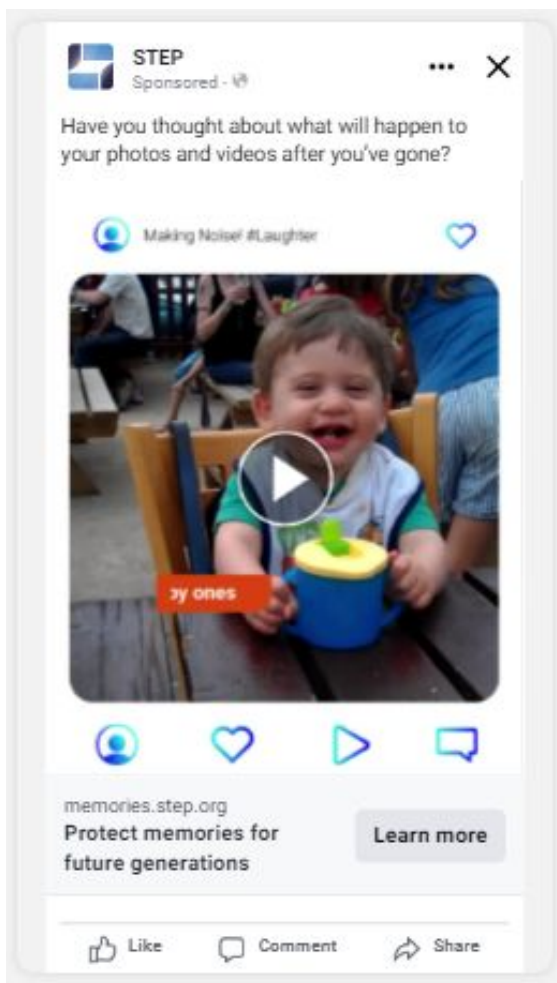
Protect your digital memories for future generations

There are three things you can do today to protect your digital memories

1. Update your legacy settings

It takes **just five minutes** to log in to your digital accounts, update the legacy settings and protect your digital memories.

[Click to make changes](#)



STEP Sponsored - 1/18

Have you thought about what will happen to your photos and videos after you've gone?

Making Noise! #Laughter

memories.step.org
Protect memories for future generations [Learn more](#)

Like Comment Share



Instagram

step_advising_families Sponsored

STEP

Protect your digital memories for future generations...

[Learn more](#)

step_advising_families With your photos and video all stored on the cloud, how these will get passed ... more

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

