

STEP EXAM ROUTE TO ENTRY

In order to enrol on a STEP course you must have obtained the correct number of credits or currently be a STEP Member. See full details on the credits required at the course web pages via www.step.org/qualifications

Enrolment Form: Please complete in BLOCK CAPITALS



Please tick only one:

I am a STEP member/I have been approved as having the correct number of Entry Level credits by STEP

I have been approved Entry Level credits by CLTi

I am applying for a Certificate level course and therefore am not required to have obtained any credits with STEP

1. STEP Membership (Disregard this section if you are already a STEP member)

It is **mandatory** to become a member of STEP and maintain your membership subscription whilst you are studying a qualification with CLT International.

STEP will send you an email confirming your new member status within seven working days of receiving your enrolment details from CLT International. You will be asked to log into the STEP website to pay your membership fees following receipt of your welcome email. The course fee does not include your STEP membership fee. To learn more about the benefits of becoming a STEP member please visit www.step.org/benefits

Please visit www.step.org/qualifications/about-step-and-clt-international to better understand how CLTi and STEP will support you through your study journey.

All members of STEP must be affiliated with their local Branch or Chapter. Details of Branches and Chapters can be found at www.step.org/branches-chapters

Please specify to which Branch or Chapter you wish to be affiliated (compulsory):

By signing this document you are confirming that you will abide by STEP's Membership Rules which can be found at www.step.org/join-us/your-commitment

Signature:

Date

2. Personal Details *includes mandatory fields

CLTi Candidate Number (if applicable):

STEP Membership Number (if applicable):

Title (e.g. Mr/Mrs/Ms):*

First Name(s):*

Last Name:*

Date of Birth: (optional)

Gender:

Male

Female

Address:*

City/Town:*

Country:*

Postcode:*

Telephone Number (Preferred):*

Telephone Number (Alternative):

Email:*

Confirmation of your enrolment, course updates and access to the online learning platform are sent via email. Please ensure your spam filter is disabled.

Dietary Requirements:

Special Requirements: If you have a reasonable adjustment (e.g. disability) which will affect your studies or assessment, you will need to make a separate application to CLT International. For details of how to make an application, please visit www.cltint.com/special-requirements Applications must be made at least eight weeks prior to the assessment (or workshop, if applicable).

3. Professional Details

Your Professional Details

Job Title:*

Please select the description (below) that best suits your current professional role:

- | | | |
|---|---|--|
| <input type="checkbox"/> Academic | <input type="checkbox"/> Fund Administrator/Manager | <input type="checkbox"/> Probate Executive |
| <input type="checkbox"/> Accountant | <input type="checkbox"/> HR | <input type="checkbox"/> Secretarial/Administration |
| <input type="checkbox"/> Banker | <input type="checkbox"/> Insurance Advisor | <input type="checkbox"/> Tax Advisor |
| <input type="checkbox"/> Barrister | <input type="checkbox"/> Judge | <input type="checkbox"/> Trust Manager (Senior) |
| <input type="checkbox"/> Client Relations/Marketing/Sales | <input type="checkbox"/> Lawyer: (Partner level) | <input type="checkbox"/> Trust Officer/Trust Administrator |
| <input type="checkbox"/> Compliance Officer/Manager | <input type="checkbox"/> Lawyer: Solicitor/Attorney | <input type="checkbox"/> Trustee/Fiduciary |
| <input type="checkbox"/> Corporate Administrator | <input type="checkbox"/> Legal Assistant/Paralegal | <input type="checkbox"/> Wealth Management |
| <input type="checkbox"/> Estate Planner | <input type="checkbox"/> Legal Executive | <input type="checkbox"/> Will Writer |
| <input type="checkbox"/> Financial Planner | <input type="checkbox"/> Notary | <input type="checkbox"/> None of the above |

Your Employer Details

You can leave this section blank if your employer is not supporting you on this course

Employer:*

Employer Contact Email:

Employer Address:*

Employer Contact Telephone No:

City/Town:

As part of the customer journey, CLT International may wish to contact your employer with regards to relevant training programmes, professional qualifications and eLearning packages. Your employer should tick the relevant box below to tell us if, and how, they would prefer us to issue our communications:

Country:

Yes, I would like to receive communications from CLT International

Postcode:

Email Telephone Hardcopy

Employer Contact Name:

I do not wish to receive communications from CLT International

Employer Contact Job Title:

Employer Signature:

Employer Contact Department:

4. Contact Permission

As part of your learning journey, CLT International and STEP would like to keep you informed with regards to any relevant training programmes available, including professional qualifications and eLearning packages. Please tick the boxes below to tell us if, and how, you would prefer us to communicate with you:

Yes, I would like to receive communications from CLT International:

Email Telephone Hardcopy

Yes, I would like to receive communications from STEP:

Email Telephone Hardcopy

I do not wish to receive communications from CLT International

I do not wish to receive communications from STEP

Please note: If you opt out of communications from STEP and/or CLT International, we will still have to contact you regarding this course and your STEP membership, but will not contact you regarding other relevant training programmes.

5. Course Selection

Please indicate which course(s) you are applying for below - all STEP courses can be found at www.step.org/qualifications

STEP Certificate for Financial Services – Trusts and Estate Planning, Singapore

Please state the course fee(s) below: Course fee can be found at www.clint.com. (If you are registering for more than one course, please state each fee separately and then total to be paid)

Early Bird Rate before 13th February 2019– S\$4,000

Standard Rate after 13th February 2019 – S\$4,900

Please indicate your chosen examination/assignment submission date (DD/MM/YYYY) (for available dates see www.clint.com)

Date

6. How did you hear about the course

Please tick as many as apply

- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> Industry magazine (not STEP Journal) | <input type="checkbox"/> STEP Email | <input type="checkbox"/> Flyer at an event |
| <input type="checkbox"/> Industry website (not STEP) | <input type="checkbox"/> CLTI Website | <input type="checkbox"/> Direct Mail |
| <input type="checkbox"/> Industry e-newsletter (not STEP) | <input type="checkbox"/> CLTI Email | <input type="checkbox"/> Word of mouth from a colleague |
| <input type="checkbox"/> STEP Journal | <input type="checkbox"/> Social Media | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> STEP Website | <input type="checkbox"/> Google | |

7. Payment Method

Please indicate whether you are self-funding or your employer is paying the fee

- Self-funding
 Employer is paying

Employer signature if paying the course fee:

Please tick the appropriate box

- I enclose a cheque/bankers draft made payable to Rockwills Institute Pte Ltd
 Please invoice my employer, who has agreed to pay the fee

Please ensure all fields below are completed

Invoice contact name:

Invoice telephone number:

Purchase Order number (if applicable):

8. Terms and Conditions

By signing this document, you confirm that you have read, understood, and agree to the CLT International's terms and conditions of enrolment. These terms and conditions can be found at on the relevant course page at www.cltint.com

Signature of Applicant:

Date

9. Data Protection

CLT International and STEP are committed to protecting the privacy and security of your personal information. By signing this document, you confirm that you have read, understood, and agree to CLT International's Privacy Policy which describes how CLT International and STEP collect and use personal information about you in accordance with data protection law. Please visit www.cltint.com/our-privacy-policy and www.step.org/privacy-notice to find out more.

To return this form by post:

CLT International, Wrens Court, 52/54 Victoria Road
Sutton Coldfield, Birmingham B72 1SX, England
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