

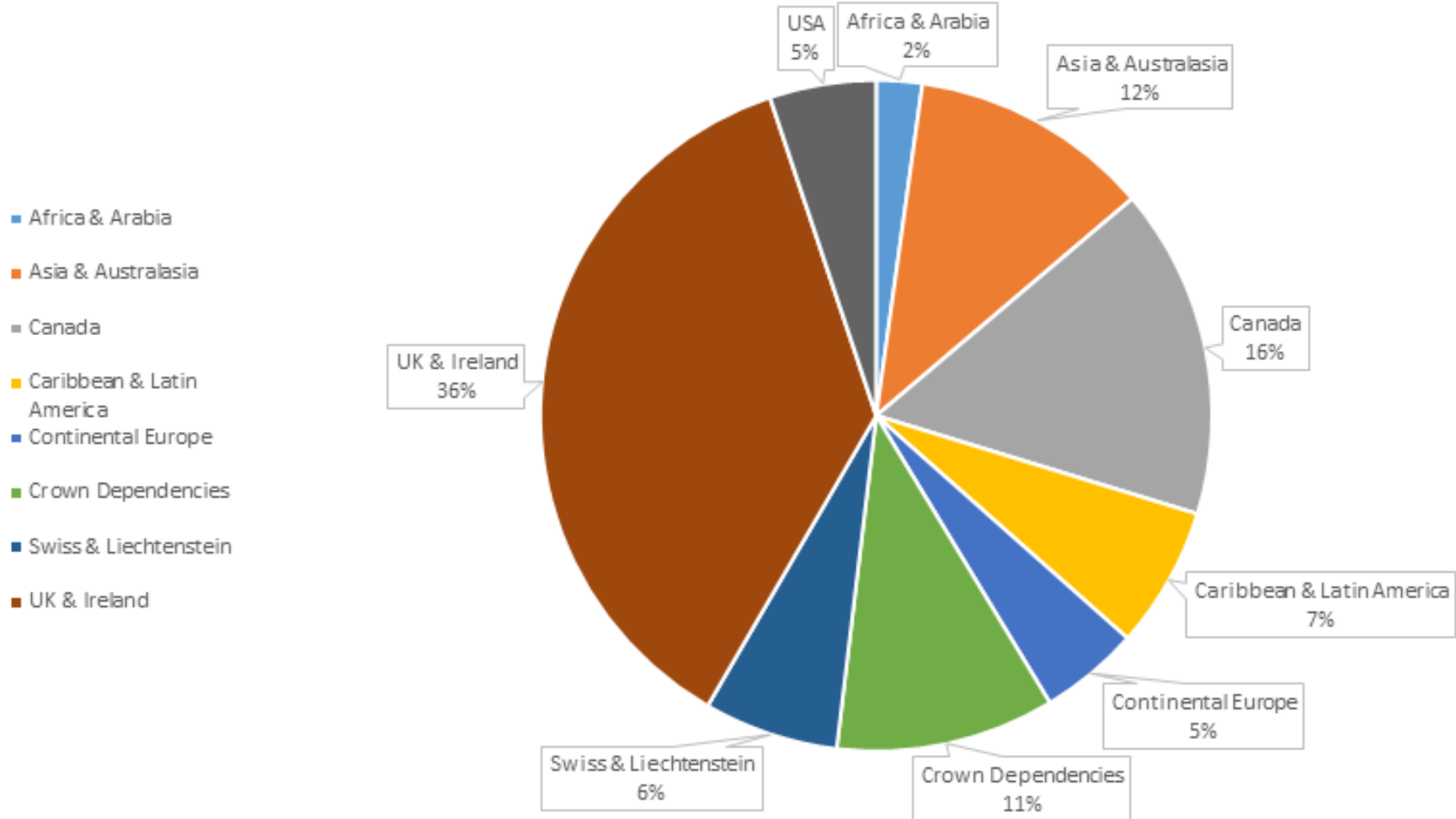
# Strategic View

Tony Pitcher, Chair

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

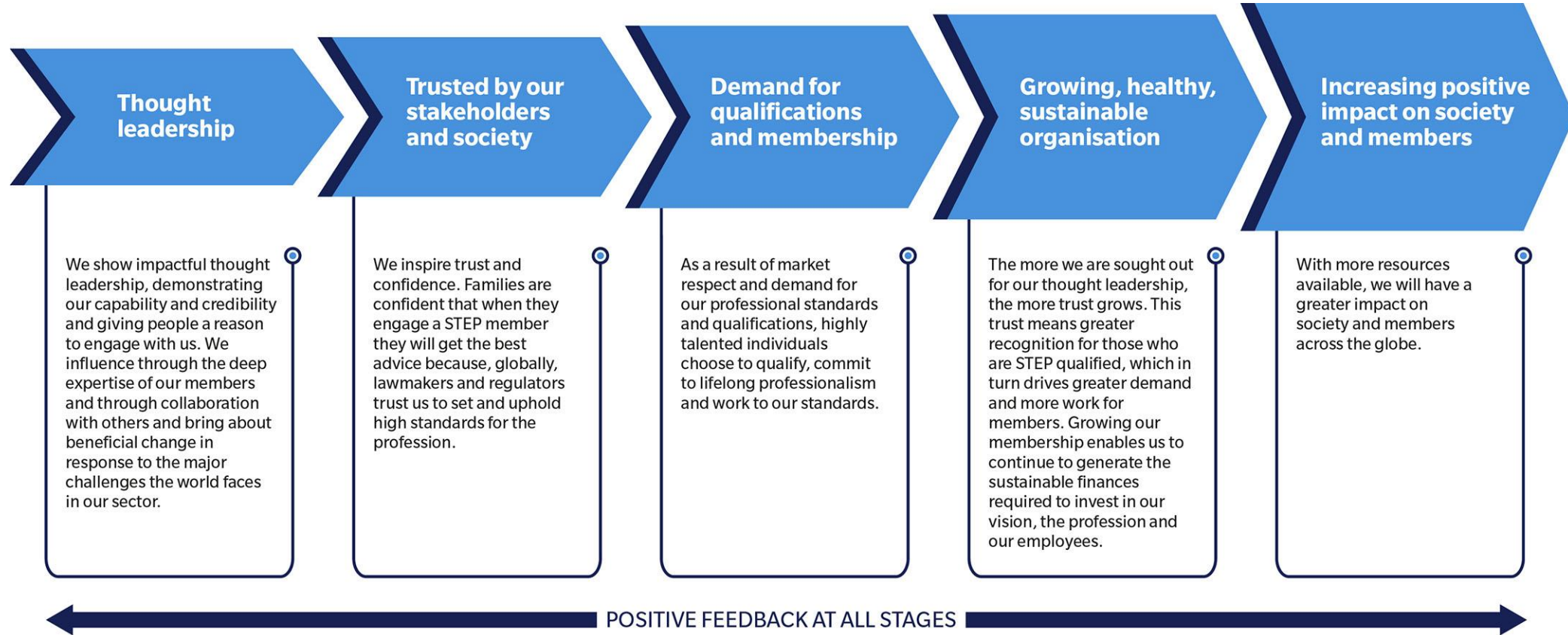
# STEP's global reach

Members by Region





# 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

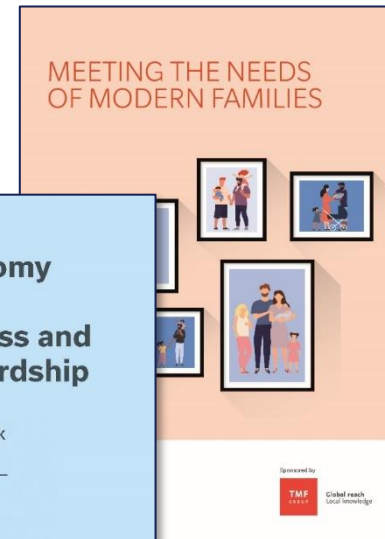
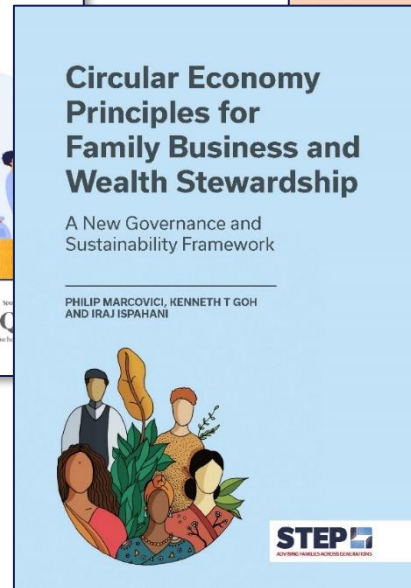
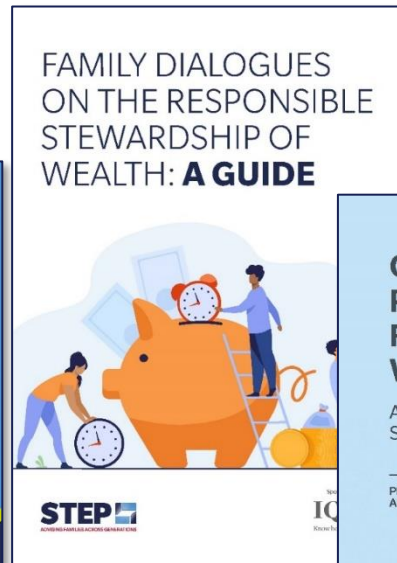
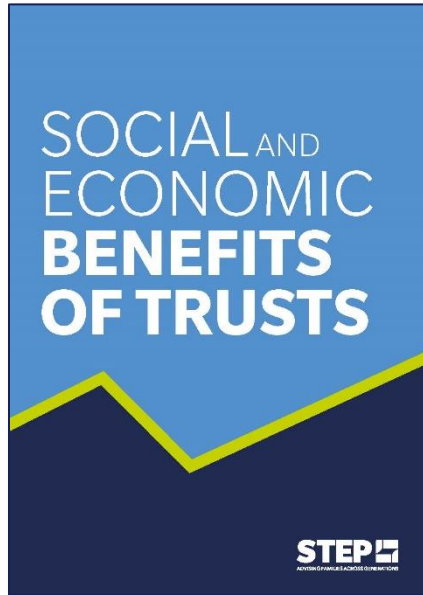
# Excelling in Education

**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**



# Public Policy





# Special Interest Groups (SIGs)

*“professional community groups and international information networks”*

*“facilitating an international forum of support, expertise, thought leadership, advice and guidance”*

*“giving special focus to some of the more complex issues families face in planning their future”*

## Global groups exist in the following focused areas:

▪ **Business Families**

[www.step.org/business-families](http://www.step.org/business-families)

▪ **Contentious Trusts and Estates**

[www.step.org/contentious-trusts-and-estates](http://www.step.org/contentious-trusts-and-estates)

▪ **Cross-Border Estates**

[www.step.org/cross-border-estates](http://www.step.org/cross-border-estates)

▪ **Digital Assets**

[www.step.org/digital-assets](http://www.step.org/digital-assets)

▪ **International Client**

[www.step.org/international-client](http://www.step.org/international-client)

▪ **Mental Capacity**

[www.step.org/mental-capacity](http://www.step.org/mental-capacity)

▪ **Philanthropy Advisors**

[www.step.org/philanthropy-advisors](http://www.step.org/philanthropy-advisors)

**CONTACT:**

**Email:** [SIGs@step.org](mailto:SIGs@step.org)

**Website:** [www.step.org/sigs](http://www.step.org/sigs)

# 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

