

# STEP Certificate/Diploma in International Trust Management

Course Enrolment Form Please complete in BLOCK CAPITALS

i Personal Details	4 Education/Qualifications
Title: First Name(s):	Please indicate your educational background and qualifications (if any):
Family Name(s):	(ii aiiy).
Sex (M/F): Date of Birth (optional):	
Address:	
City: Postcode/Zip:	
Country:	5 Course Selection
Telephone No - Daytime:	I wish to enrol on the following course (only one booking per form):
Evening:	Please <b>tick one box only</b> then write the jurisdiction and date of the face-to-face course and examination in the boxes provided.
Fax No:	Certificate
E-mail (compulsory):	
Special Requirements:	Diploma
Dietary:	Trust Creation: Law and Practice
	Trust Creation. Law and Fractice
Disability:	Company Law and Practice
2 Employment Sector	Gompany Law and Fractice
1 /	Trust Administration and Accounts
If you are employed please state:	
Job Title:  Area of Specialisation:	Trustee Investment and Financial Appraisal
Nature of Duties:	
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Do you want your employer to know that you are taking this course?	6 Enrolment
If 'NO' move to Section 4. Yes No	On completion of this form please send to:
3 Employer Details	CLT International/STEP Registrar CLT International Ltd
• •	Wrens Court, 52-54 Victoria Road
Employer:	Sutton Coldfield, Birmingham B72 ISX ENGLAND
Employer Address:	Tel: +44 (0) 121 355 0900 Fax: +44 (0) 121 362 7510 Email: cltstep_registrar@centlaw.com
Town: City:	
Country: Postcode/Zip:	7 Fees
Employer Contact Name:	All prices in UK Pounds Sterling
Employer Job Title:	All prices are subject to local taxes
Employer E-mail:	Certificate - Full Programme £1,525
Employer Telephone No:	(Distance Learning Course, Face-to-face-course and Examination and annual STEP student membership subscription)
Employer Fax No:	
Course materials to be delivered to:	<b>Diploma - Full Programme</b> £1,575 (per paper) (Distance Learning Course, Face-to-face-course, Examination and
Home Address Employer Address	annual STEP student membership subscription)

## 8 Payment Method

- I. Upon receipt of an application form an invoice requesting payment of course fees will be sent to the payer within three days. Invoices must be paid within 21 days of receipt. Payment can be made by completing the credit card form below, by electronic bank transfer, or by cheque payable to CLT International Ltd.
- 2. Please tick the appropriate box for issue of the invoice and specify the fax or email number.

Please invoice my employer, who has agreed to pay the fee.		
Please invoice me at my personal address.		
Other (please specify)		

#### Payment may be made by:

Credit Card			
Card issuer:			
(Please note we cannot accept payment by American Express or American Diner)			
Cardholder's name:			
Credit card No:			
Card expiry date: /			
Security code (7 digit code on signing stripe)			

Electronic Bank Transfer to:
CLT International Ltd Barclays Bank Plc London Corporate Banking P.O. Box 544 54 Lombard Street LONDON EC3V 9EX
Sort Code 20-82-94
Account No. 30568392
IBAN No. GB15BARC20829430568392
Ref. (your name)

Signature of Employer:		
	Date:	
Signature of Applicant:		
	Date:	

## 9 STEP Application

Please complete this section if you are enrolling on the STEP Certificate or your first STEP Diploma Course.

Please do not complete this section if you are already a STEP student member.

Before completing this section, please refer to the STEP website www.step.org/branches for details of the location of STEP branches.

(Certificate or new Diploma students only)
As a student member of STEP, I would like to join the following STEP branch:

STEP will be notified of your enrolment within one month.

Your welcome letter from STEP will be sent to you in the next 6-10 weeks. Please do not send in payment of STEP membership fees with your enrolment fee payment.

Please note that all members of STEP must comply with the Code of Professional Conduct. This can be found by visiting www.step.org/codeofconduct

How did you hear about STEP?	

### 10 Data Protection

The information you have provided will be used by CLT International, STEP and its branches or approved agents for administrative, membership and educational purposes or as required by law.

From time to time CLT International and/or STEP and its branches may pass your details to third parties to enable them to send you information about products and services approved by CLT International and/or STEP.

If you do not want to receive mailings from third parties, please let us know by ticking the box below.

- I do not wish to receive mailings from third parties approved by CLT International and/or STEP relating to beneficial products and services.
- $\hfill \hfill \hfill$

## **II** Terms and Conditions

- I. CLT International reserves the right to vary or cancel a course or examination where the occasion necessitates.
- CLT International accepts no liability if, for whatever reason, the course or examination does not take place.
- Distance Learning Course materials will be distributed upon enrolment. Lecture Course materials will be distributed at the start of the face-to-face course.

#### 4. Refunds:

- If a delegate withdraws from the course eight weeks or more prior to the start date of the face-to-face course, the course fee, less an administration charge of £250, will be refunded to the original payer. If a delegate withdraws less than eight
- If a delegate withdraws less than eight weeks prior to the start date of the face-to-face course, 50% of the course fee will be refunded to the original payer.

If a delegate attends the face-to-face course but fails to take the examination, no refund will be paid.

#### 5. Deferrals:

Delegates may defer the taking of an examination, limited to two deferrals per course, by making prior written application to the course director at CLT International. If a delegate defers from the course eight weeks or more prior to the start date of the face-to-face course no additional cost will be incurred. If a delegate defers less than eight weeks prior to the start date of the face-to-face course an administration fee of £200 will be charged.

6. Subject to acceptance by CLT International this booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of all fees due to CLT International.

# 12 Signature of Applicant

Signature of Applicant:	
Date:	





