

CTTC Ltd and the Society of Trusts and Estate Practitioners (STEP)



Why choose Countrywide Tax & Trust Corporation Ltd to manage your affairs?

- ✓ CTTC Ltd adheres to the STEP Will Writing Code
- ✓ Our Directors and many of our staff are qualified STEP Members
- ✓ STEP Members are internationally recognised experts within their field
- ✓ Specialists in Family Inheritance and Succession Planning
- ✓ Always up to date with current legislation

In Detail

What is STEP?

STEP (Society of Trust and Estate Practitioners) is the leading international association for advising families across generations in the area of Wills, Trusts and Estates. They work to improve public understanding of the issues families face in the above areas, and promote education and high professional standards with their members.

STEP Members

STEP Members are practitioners who specialise in family inheritance and succession planning and they are acknowledged by the STEP Code of Professional Conduct, which sets out the key ethical and professional standards they should uphold.

STEP has a clear disciplinary process for investigating any potential breaches of the Code of Professional Conduct.

As specialists in estate planning, STEP members draft Wills and Trusts, administer estates, act as Trustees and advise families on how best to structure their finances to preserve their assets for future generations.

Some examples of what STEP Members may advise on are:

- Providing for someone following their partner's death, while protecting the interests of their children against third party attack.
- Ensuring elderly or vulnerable relatives are cared for and supported.
- Ensuring that a family business will pass safely from one generation to another.
- Helping families with interests spread across the world to be compliant with the laws and tax rules of different countries.
- Ensuring the client understands the tax implications of any work done.

What is a TEP?

Full STEP members, known as TEPs, are recognised experts in their field, with proven qualifications and experience. This means TEPs will always be up to date with the latest legal, technical and regulatory developments that may affect you and your situation.

A TEP member has access to 20,000 professionals which means they have the opportunity to share their knowledge and experience, and offer a joined-up service to add value to you as a client.

To become a TEP, Practitioners must have a combination of specialist qualifications and experience, including significant involvement with planning, management of and accounting for Trusts and estate, Executorship administration and related taxes.

CTTC Ltd Directors, Clive Ponder TEP, Bob Massey TEP, Charlotte Ponder TEP LLB and Spencer Tattam TEP DipPFS are all full members of STEP and have completed the STEP Diploma. Many other of CTTC Ltd's staff are also full members of STEP or Affiliate STEP members (See Client Support Information sheet 20 - Company).

Details on our Full STEP Members can be found on the STEP Members page at www.countrywidegroup.co.uk/about-us/full-step-members

Why choose us?

Peace of mind with our expertise

Having a Will gives you the power to decide who your assets pass on to on your death. If you pass away without making a valid Will, intestacy rules will apply that may see your assets pass to people you never intended.

It is important to use a qualified practitioner as a badly drafted Will can have unintended consequences that may lead to difficulties for your loved ones after you are gone. With us, you're in safe hands. All of our legal experts are subject to an extensive Code of Professional Conduct, requiring them at all times to act with integrity and in a manner that inspires the confidence, respect and trust of you as a client and of the wider community.

CTTC Ltd adheres to the STEP Will Writing Code of Practice

STEP has introduced a Will Writing Code in England and Wales to give you peace of mind that your Will preparer is doing the best possible job in helping you plan for the future. All STEP Members are bound by the STEP Code of Professional Conduct, which sets out the key ethical and professional standards they should uphold.

The Code will also provide you with an understanding of the sorts of issues your Will preparer should discuss with you, and most importantly will provide you with a reassurance that when you choose to use an Advisor who adheres to the STEP Code, you are working with a professional who conducts their business in an open and transparent manner.

By using a Will preparer who is subject to the STEP Code for Will Preparation in England and Wales, you will know they are taking all the necessary actions to plan for the future of your assets.

