

Please complete in BLOCK CAPITALS

Course Enrolment Form

1. Personal Details

Title: Designation:

First Name(s):

Family Name(s):

Sex (M/F): Date of Birth (optional):

Address:

.....

City: Postcode:

County:

Telephone No - Daytime:

Evening:

Fax No:

E-mail:

Special Requirements:

Dietary:

Disability:

.....

2. Employment Sector

If you are employed please state:

Job Title:

Department:

Area of Specialisation:

Nature of Duties:

**Do you want your employer to know
that you are taking this course?**

Yes

If 'NO' move onto Section 4.

No

3. Employer Details

Employer:

Employer Address:

Town/City:

Country: Postcode:

Employer Contact Name:

Employer Job Title:

Employer E-mail:

Employer Telephone No:

Employer Fax No:

Course materials to be delivered to:

Home address Employer address

4. Education/Qualifications

Please indicate your educational background and qualifications (if any):

.....

.....

5. Course Selection

I wish to enrol on the following course(s):

Course title:

Foundation Certificate

Administration of Estates

Administration of Trusts

Taxation of Trusts and Estates

Trust and Estate Accounting

Date of examination(s): Mth Yr

Mth Yr

Please indicate where you would like to take the course:

| | London | Manchester | Birmingham | Bristol | Leeds |
|-------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Workshop 1 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Workshop 2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Examination | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. Enrolment

On completion of this form please send to:

CLT International/STEP Registrar, CLT International Ltd
Wrens Court, 52/54 Victoria Road
Sutton Coldfield, Birmingham, B72 1SX, ENGLAND

Tel: +44 (0)121 355 0900 Fax: +44 (0)121 362 7510

Email: cltstep_registrar@centlaw.com

7. Fees

All prices in UK Pounds Sterling

Foundation Certificate/Diploma £575 (plus VAT) per paper
(Distance Learning Course, Face-to-Face Course
and Examination)

8. Payment Method

Please tick the appropriate box:

I enclose a cheque/bankers draft made payable to CLT International

Please invoice my employer, who has agreed to pay the fee

I authorise you to debit my Visa/Mastercard (delete as appropriate)

Name on card:

Credit card No:

Security code:

Card type:

Issuing bank:

Card expiry date:

Payment amount: £

Signature of applicant: _____

Date

Signature of card holder: _____

Date

Electronic Bank Transfer to:

CLT International
Barclays Bank Plc
London Corporate Banking
P.O. Box 544
54 Lombard Street
LONDON EC3V 9EX

Sort Code 20-82-94

Account No 30568392

Ref. (your name)

Signature of applicant: _____

Date

Signature of employer:
(if paying course fee) _____

Date

9. STEP Application

Please complete this section if:

You are enrolling on the Foundation Certificate or your first Diploma course and applying for STEP membership (STEP membership is a requirement of studying the Foundation Certificate or the Diploma). **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.

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 pack from STEP Worldwide, along with your annual subscription invoice, 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. Signature of Applicant

Signature of Applicant:

Date:

11. 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.

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

12. Terms and conditions

1. CLT International for itself and STEP reserves the right to vary or cancel a course or examination where the occasion necessitates.

2. Neither CLT International nor STEP accept any liability if, for whatever reason, the course or examination does not take place.

3. Cancellations

- If a delegate withdraws from the course within six weeks of registration (and not having attended a workshop), they will be refunded the course fee less 20%.
- If a delegate withdraws from the course after six weeks of registration (and not having attended a workshop), they will be refunded the course fee less 50%.
- If a delegate withdraws from the course as above but has attended one or more workshops a further deduction of 20% of the course fee will be applied to the refund in respect of each workshop attended.
- In other circumstances no refund will be paid save at the discretion of CLT International.

4. Deferrals / Non-Attendance Examinations

- 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 an examination 4 weeks or more prior to the examination **and** transfers to a later examination date, no fee will be incurred.
- If a delegate defers an examination less than 4 weeks but 2 weeks or more prior to the examination **and** transfers to a later examination date an administration fee of £50 (excl. VAT) will be charged.
- If a delegate defers an examination less than 2 weeks prior to the examination **and** transfers to a later examination date an administration fee of £100 (excl. VAT) will be charged.
- If a delegate fails to attend an examination (without deferring as above) an administration fee of £100 (excl. VAT) will be charged **and** a further fee of £25 (excl. VAT) will be charged to re-register for that examination.

Induction/Workshop/Revision Days

- On enrolment a delegate is registered to attend the Induction/Workshop/Revision days attached to the selected examination date. If a delegate defers attendance **less than 2 weeks** before an **Induction/Workshop/Revision** day or fails to attend without prior written notice an administration fee of £100 (excl. VAT) will be charged.
- If a delegate wishes to re-attend any Induction/Workshop/Revision day a fee of £100 (excl. VAT) will be charged.

5. Examinations

No delegate will be permitted to sit any examination, nor register for any further course(s), until any outstanding balances have been paid. In the event that a delegate sits an examination and it transpires that balances remain unpaid, the delegate's examination answer paper will not be marked until such balances are cleared.

6. This booking form constitutes a legally binding contract. The delegate is liable for payment of all the fees due to STEP. To the extent permitted by law, neither CLT International, STEP nor its presenters will be liable by reason of breach of contract, negligence or otherwise for any loss or consequential loss occasioned to any person acting omitting to act or refraining from acting in reliance upon the course material or presentation of the course or, except to the extent that any such loss does not exceed the price of the course, arising from or connected with any error or omission in the course material or presentation of the course. Consequential loss shall be deemed to include, but is not limited to, any loss of profits or anticipated profits, damage to reputation or goodwill, loss of business or anticipated business, damages, costs, expenses incurred or payable to any third party or any other indirect or consequential losses.

Delivered in association with