

18th Annual



STEP PRIVATE
CLIENT
Awards

ENTRY KIT

Awards Charity



**Alzheimer's Disease
International**

The global voice on dementia

STEP 

ADVISING FAMILIES ACROSS GENERATIONS

ENTRY KIT

The STEP Private Client Awards are open to both STEP members and non-members and entries are encouraged from all over the world and from the whole of the diverse private client community. Entries for the STEP Private Client Awards 2023/24 are open until 14 April 2023.

CATEGORIES AND CRITERIA

CATEGORIES

- Accountancy Team of the Year
- Boutique Firm of the Year
- Contentious Trusts and Estates Team of the Year
- Digital Assets Practice of the Year
- Employer of the Year
- Family Business Advisory Practice of the Year
- Financial Advisor Team of the Year
- International Legal Team of the Year
- Investment Team of the Year
- Multi-Family Office Team of the Year
- Philanthropy Team of the Year
- Private Client Legal Team of the Year
- Trust Company of the Year
- Trusted Advisor of the Year
- Vulnerable Client Advisory Practice of the Year
- Young Practitioner of the Year

SPECIAL AWARDS

- The Geoffrey Shindler Award for Outstanding Contribution to the Profession
- Lifetime Achievement Award

CRITERIA

The Awards are open to solicitors/attorneys, accountants, advocates, barristers, bankers, trust managers, financial advisors and other specialists in the private client sector. Entries are accepted from practitioners worldwide. Please see specific criteria below for details of which categories you should be entering and what to include in your entry. All entries are judged according to the stated criteria (excluding Investment Team of the Year, which is judged according to the criteria plus additional quantitative data). Firms may enter multiple categories. For larger organisations, entries may be made – and indeed are welcomed – from one particular office or region of a larger team. Multiple entries by different offices, teams or regions within the same firm for the same category are not precluded. However, such entries will need to clearly explain why multiple entries are appropriate: experience shows that multiple entries from the same firm count against that firm.

TO ENTER:

- Review the category(s) your firm will enter. Multiple entries by different offices, teams or regions within the same firm for the same category are not precluded. However, such entries will need to clearly explain why multiple entries are appropriate: experience shows that multiple entries from the same firm can count against that firm.
- If you are entering multiple categories, please use the 'Add a Submission' function during the online entry process. If you wish to submit multiple entries at separate times each entry will need to have a different contact email address.
- Your entry will be judged using the criteria stated under that category, with each criteria point carrying an equal weighting. It is therefore essential that you address all criteria to ensure points are not lost. The Investment Team of the Year category carries a weighting of 60% for part A and 40% for part B.
- The Awards are intended to highlight those that have achieved particular success over the past year (15 April 2022 - 14 April 2023), so examples and commentary should specifically relate to that time period.
- Download and use the 'Submission Template' provided for each individual category. Entrants who do not use the submission template provided for each category will not be accepted. The entry must be saved as a plain text word document (.doc or .docx only). PDF documents or documents containing images, charts, graphs or coloured text will not be accepted unless it is for the Investment Team of the Year category.
- Please ensure you enter the following information as outlined on the submission template;
 1. Name of the Company/Individual entering the Award
 2. Country of the Company/Individual entering the Award
 3. Word Count (Excluding criteria headers)
- For the Accountancy Team, Employer and Trust Company of the Year categories, all entrants will need to submit additional data on the number of staff in the firm globally (including those who are client-facing, directors, and in a related professional firm within the same group/ownership), details of which can be found when you upload your submission online.
- For the Boutique Firm of the Year category all entrants will need to submit additional data on the number of fee earners in the firm globally. The definition of fee earners can be viewed at pca.step.org/FAQs
- For the Contentious Trusts and Estates, International Legal and Private Client Legal Team of the Year categories all entrants will need to submit additional data on the number of fee earners in the team globally and the firm globally. The definition of fee earners can be viewed at pca.step.org/FAQs
- For the Investment Team of the Year category all entrants will need to submit additional quantitative data, which carries a weighting of 40%. Please see pca.step.org/categories/2023/investment-team-year for the full details of quantitative data required.
- Ensure your entry is no more than 1,100 words. Entries of over 1,100 words will not be accepted by the judges. All text within the document (excluding criteria headers/headers on the submission templates) will be counted in the word count, including any references and appendices. We would suggest scaling the appendices back or leaving them out altogether if possible. **NB: URL links are NOT permitted within the submission.**
- When you submit your entry online you will be required to provide contact details.
- We do not charge a fee to enter the STEP Private Client Awards, but rather ask for donations to our awards charity. STEP's new Awards charity partner is Alzheimer's Disease International. They support and work with Alzheimer and dementia associations in 120 countries, as well as people living with dementia, carers and all relevant organisations to help raise awareness, challenge stigma and to call for dementia to be the global health priority it needs to be. Donations with our previous charity partners ranged from GBP150 to GBP2,000 per entry and a total of over GBP60,000 was raised last year. You will receive instructions on how you can make your donation once your entry has been received by the Private Client Awards Team.
- An email confirmation will be sent following your submission providing you with a unique confirmation number for your entries.
- All entries received will be treated as completely confidential at all times.
- All entries will be made available to the presiding Judges Panel after 14 April 2023, and then finalists' submissions will be shared with the Panel of Experts at the finalist stage, June 2023.
- The presiding judges may decide that there are insufficient entries of a high enough quality to progress with a category and may drop a category under such circumstances.
- Depending on the entries received, the presiding judges may decide that there is sufficient evidence to split the Accountancy, Boutique, Contentious Trusts and Estates, Employer, International Legal, Private Client Legal and Trust Company categories into subcategories and entrants will be advised under these circumstances at shortlist stage.
- A firm/individual is eligible to win up to three consecutive years in a particular category. In the fourth year those winners will be excluded from entering and will be eligible to enter again in the fifth year. This rule does not apply for subsidiary/affiliate firms or teams based in different jurisdictions.
- All entries must be received by midnight on 14 April 2023.
- All categories are self-nomination, except the Young Practitioner of the Year Award, the Geoffrey Shindler Award for Outstanding Contribution to the Profession and the Lifetime Achievement Award.
- Entries may be disqualified if application information is found to be false or misleading or previous submission information has been reused. Disqualification is at the discretion of the Judges/Panel of Experts and will be considered on a case by case basis.
- Firms/directors/partners or individuals put forward for an award must declare to the Awards Secretary by emailing pca@step.org if either the firm, its principals, any employee, or any individuals put forward for an individual award, are currently subject to, or become subject to during the course of the entry and judging process (30 January-21 September 2023), any criminal or regulatory proceedings by any regulatory authority that are in the public domain, or might come into the public domain during that period the sanction for which might be publicised. Where there are such details the information must be discussed by the Judges. Subject to the outcome of any investigation undertaken by STEP, the entry may be withdrawn from the Awards.
- It is not usual for awards to be revoked following a ceremony. However should an award have been given based on information which is later shown to be false or misleading or the subsequent behavior of an individual is considered to bring disrepute upon the trust and estate profession and/or the name of STEP, awards may be revoked. Any such decision will be taken by the STEP Board.
- You will find out if you are shortlisted in June 2023.

If you have any questions about the Awards, please email the STEP PCA Team at pca@step.org or call +44(0)20 3752 3700.

ACCOUNTANCY TEAM OF THE YEAR

The Accountancy Team of the Year award applies to teams of accountants dealing with private client issues.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories and entrants will be advised under these circumstances at shortlist stage.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Demonstrate strong management and growth within the sector.
2. Explain how the team has demonstrated excellence in client service delivery.
3. Provide examples of innovation that differentiate you from your competitors.
4. Outline the team's technical expertise and support for continuing professional development and education.
5. Demonstrate the team's commitment to the wider profession.

BOUTIQUE FIRM OF THE YEAR

The Boutique Firm of the Year Award is for a sole practitioner, or a practice, specialising in private client services with an average (over the period 15 April 2022–14 April 2023) of ten or fewer fee earners in the firm, globally. This award is not open to practices within a larger firm. Please see pca.step.org/FAQs for the full definition of fee earners.

Focusing on the year 15 April 2022–14 April 2023 only, address the following five criteria: they are equally weighted.

1. Describe the firm's approach to client management.
2. Explain how the firm collaborates with other service providers to enhance its client offering.
3. Explain why the boutique nature of the firm sets it apart from larger practices, and the benefits that this brings to its clients.
4. Provide specific examples of excellent client service that aims to build lasting relationships.
5. Demonstrate commitment to the wider profession.

CONTENTIOUS TRUSTS AND ESTATES TEAM OF THE YEAR

The Contentious Trusts and Estates Team of the Year applies to a team of lawyers specialising in disputes that require resolution, whether through litigation or other means.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories; if so, entrants will be advised of this at the shortlist stage.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Provide details of the most notable cases (no more than three) handled by the team, explaining their significance and the key legal issues involved.
2. Highlight the team's range of skills, and explain how it interacts with colleagues in commercial litigation and non-contentious fields.
3. Demonstrate how the team attract and secure new client relationships in this specialist field.
4. Provide examples of innovation that differentiate the team from its competitors.
5. Demonstrate the team's commitment to the wider profession.

DIGITAL ASSETS PRACTICE OF THE YEAR

The Digital Assets Practice of the Year Award recognises a practice (which could be a sole practitioner, a discrete advisory practice within a firm, an initiative within a firm or a dedicated advisory firm/team) or individual that focuses on navigating the complex issues that confront families regarding digital assets / their digital estate.

The judges are looking for solid examples of comprehensive digital asset custodian services, and/or excellence in innovation and development of digital assets advice for clients. They are wanting to see evidence of how the knowledge, skills and advice you provided clients was accurate, relevant, timely and valuable, enabling the client to protect and manage the use and access of their digital assets.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following four criteria: they are equally weighted.

1. Demonstrate excellence in client service in relation to their digital assets.
2. Provide specific examples of key cases (no more than three) that exemplify those handled over the relevant period, and how the client benefitted.
3. Provide examples of innovation, infrastructure and/or adoption, use of, or development of technology used to assist the business or your clients in relation to digital assets.
4. Demonstrate how the practice contributed to the advancement of digital assets best practice, supporting development of the digital assets ecosystem and/or championing others to develop their skills and knowledge in the digital assets context. For example through internal staff briefings, the development of industry best practice, standards and guidelines, participation in industry forums, the delivery of lectures or papers or technical articles on the topic, raising public awareness or informing policy and regulation.

EMPLOYER OF THE YEAR

The Employer of the Year Award is open to any organisation that employs staff working in private client and/or trust administration or management, and recognises organisations that go above and beyond for their employees, supporting their development, promoting high standards and providing a happy and healthy work environment.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories; if so, entrants will be advised of this at the shortlist stage.

Focusing on examples and initiatives from the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted. The employee voice should feature in your entry.

1. Provide examples of activities that foster a dynamic, happy and healthy workplace.
2. Explain how the organisation supports employees' continued learning and development.
3. Demonstrate the organisation's commitment to equality, diversity and inclusion.
4. Outline the organisation's approach to the promotion and upholding of high professional and ethical standards.
5. Demonstrate that the importance of continued development within a positive and supportive working environment is championed from the top of the organisation.

NB: STEP's Employer Partnership Programme (EPP) accredits organisations' learning and development provision against a number of standards. These standards provide some useful guidelines to consider when entering this category. You can find the EPP guidelines at www.step.org/EPP-guidelines

FAMILY BUSINESS ADVISORY PRACTICE OF THE YEAR

The Family Business Advisory Practice of the Year award recognises a practice (which could be a sole practitioner, a discrete family business advisory practice within a firm, lawyers, accountants or a dedicated family advisory firm) that specialises in navigating the complex issues that arise in family businesses. Submissions should focus on advice regarding the competing dynamics between family and business and their governance, rather than simply on advising businesses that happen to be run by families. Your entry should include the percentage of the firm's total work that this area of work represents. You should only enter if your organisation focusses significantly and in depth on this area of work; if it does not, your entry will be unlikely to succeed.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Provide examples of the development of knowledge and practice beyond the core disciplines, relevant to the specialist issues arising in the context of family businesses and related families.
2. Provide details of relevant key cases (no more than three) handled over the relevant period, and how the business and family benefitted.
3. Provide specific examples of the approach taken to gain the respect, understanding and trust of clients.
4. Highlight the practice's range of competencies and knowledge in the family business context; e.g. qualifications from academic institutions, service on professional body committees, papers written, lectures given etc.
5. Demonstrate support for continued professional development and education in this specialised field.

FINANCIAL ADVISOR TEAM OF THE YEAR

Financial Advisor Team of the Year applies to financial advisors who offer advice on financial planning matters and recommend suitable financial products to private clients, trusts and charities.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Provide specific examples of how the team understands and aligns the business with the needs of the private client and fiduciary community (detailing access to products and services that add value).
2. Provide specific examples of a commitment to transparency and integrity.
3. Explain your charging structure and why this is in the best interest of your clients.
4. Provide examples of technical skills, specifically in relation to high-net-worth individuals and trusts and estates; and evidence of investment in continued professional development and education.
5. Explain how the team has demonstrated excellence in client service delivery.

INTERNATIONAL LEGAL TEAM OF THE YEAR

The International Legal Team of the Year applies to a legal team that focuses on cross-border or international private client work.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories; if so, entrants will be advised of this at the shortlist stage.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Explain the firm's methods and approach to multi-jurisdictional issues on cross-border and/or international private client work (providing specific examples of how the firm uses its international network and coordinates advice relating to multiple jurisdictions).
2. Demonstrate how the team attracts and secures new client relationships.
3. Provide examples of innovation that differentiate you from your competitors.
4. Outline the team's technical expertise and support for continued professional development and education.
5. Demonstrate the team's commitment to the wider profession.

INVESTMENT TEAM OF THE YEAR

Investment Team of the Year applies to firms that specialise in managing investments. Entries should demonstrate how the team has achieved strong risk-adjusted performance, and how it attracts and retains clients through providing an excellent client experience, strong client communications, and clarity and transparency, particularly in relation to fee structures and risk.

All entrants will need to submit a written submission (A), which carries a weighting of 60% and an additional data submission (B), which carries a weighting of 40%. Please read full entry guidelines below before submitting an entry.

Part (A) – Written submission (60% of award)

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following three criteria: they are equally weighted.

1. Your client service proposition and team capabilities, in particular:
 - Your client onboarding process.
 - Experience and knowledge of working with the more complex structures used in trust and estate planning.
2. The way your firm communicates and engages with clients and their advisors including:
 - *The frequency, relevance and clarity of communications, in particular the way fees and risks are explained to clients.
3. The overall investment proposition of the firm including details of the following:
 - The key investment decisions made over the past 12 months (15 April 2022–14 April 2023) and how they affected client outcomes.
 - How the firm monitors and manages investment risk.
 - How the firm integrates Environmental, Social, and Governance (ESG) criteria into the investment process and/or reporting.

* A redacted copy of a client report to support this will need to be sent through to pca@step.org by **midnight on 14 April 2023**.

Part (B) – Quantitative data questions and assessment (40% of award)

Please provide performance (net of fees) and asset allocation data for the 36-month period (January 2020–December 2022) using the data submission spreadsheet. The submission should be based on your core multi-asset strategy for portfolios typically over GBP 1 million (or equivalent in USD and EUR) and on a medium-risk mandate (based on the MPI risk ranges).

The performance assessment will be made by MP Analytics using an objective measure based on the past three years data, taking into consideration both performance, risk, and with particular focus on the most recent 12-month period.

Please include the following details about the investment strategy you have submitted.

- A description of this strategy and its objective.
- Any benchmark(s) used by the strategy.
- The approximate assets under management (AUM) invested in this strategy across all risk categories.
- A description of the data used in the submission (e.g. actual client data, reference portfolio, model)

The Role of MP Analytics

MP Analytics Limited is an independent index provider and risk/performance consultancy firm. They publish the Managed Portfolio Indices (MPI) as a free to use STEP Member Service for trustees and other approved private client advisors, based on verified data from over 130,000 trust and private client portfolios. The indices are constructed from verified performance data for over 130,000 trust and private client portfolios collated from over 50 investment manager firms and are available in Sterling, US Dollar and Euro currencies across Low, Medium and High risk categories.

MP Analytics provides analysis of investment providers to assist the judges when they are considering the submissions for Investment Team of the Year. The analysis includes a review of investment performance and risk over a 36-month (January 2020–December 2022) and 12-month (January–December 2022) period to confirm that investors have not only received good service (which will be included in the written submissions) but also good results.

MULTI-FAMILY OFFICE TEAM OF THE YEAR

This award applies to a team dedicated to meeting the comprehensive needs of several families and/or their trusts or branches of the same family. Please read the eligibility criteria for this award before entering.*

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Describe the team's approach to the listed MFO services (below) and describe which services are core to the team's offering and which are outsourced (where outsourced, explain team's approach to selecting/managing external providers).
2. Provide examples of how the team serves different generations of a client family and approaches the transition of wealth between generations.
3. Explain how the team identifies trends that will impact their client families and give an example of how the team has translated such a trend into meaningful service delivery.
4. Provide examples of the team's skills and competencies, and its commitment to continued professional development and education.

5. Explain your fee structure and why this is in the best interest of your clients.

*To be eligible, the team must meet the following criteria:

- a) Be dedicated to meeting the needs of multiple families or multiple branches of the same family and;
- b) Provide a range of the following multi-family office services:†
 - *Managing the financial wealth of the family including investment portfolio, trusts, real estate and pooled and individual investments.*
 - *Oversight of owned operating companies.*
 - *Financial, tax and regulatory planning.*
 - *Cash flow, budgeting and bill-pay.*
 - *Record-keeping and reporting.*
 - *Family succession and estate planning.*
 - *Governance for the family system and its collective wealth.*
 - *Family learning and development, including preparation of the rising generation.*
 - *Trusteeship and company management.*
 - *Philanthropy.*
 - *Risk management and security (physical, reputational and cyber).*
 - *Lifestyle (generally non-financial services).*

† Though it is not essential that entrants provide all of the above services, the award is intended for those who provide, or have a key role in overseeing, a significant range of them.

PHILANTHROPY TEAM OF THE YEAR

Philanthropy Team of the Year applies to a team that provides strategic advice to donors on philanthropic giving and structures. This award is open to philanthropy teams within a law firm, accountancy firm, bank, trust company, multi-family office or a dedicated/specialist advisory firm.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Outline the scope of philanthropy services offered and demonstrate how the team differentiates its offering and tailors its philanthropy service for clients.

2. Give specific examples of how the team demonstrates a high level of professionalism to its clients and describe how the philanthropy practice functions alongside other services that the firm offers.
3. Give examples of innovation that differentiates your firm from the competition.
4. Give specific examples of the team's technical excellence and its support for continued professional development and education.
5. Demonstrate links with philanthropic institutions such as philanthropy networks or professional membership organisations that promote education, industry developments and best practice.

PRIVATE CLIENT LEGAL TEAM OF THE YEAR

The Private Client Legal Team of the Year applies to teams of private client lawyers in firms with ten or more fee earners in the firm globally. Please see pca.step.org/FAQs for the full definition of fee earners.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories and entrants will be advised under these circumstances at shortlist stage.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Demonstrate a clear capacity to undertake complex and demanding client issues, highlighting key cases (no more than three) from the relevant period that exemplify this.
2. Detail and illustrate the team's sector specialisms.
3. Explain how the team has demonstrated excellence in client service delivery.
4. Provide examples of innovation that differentiate the team from its competitors.
5. Demonstrate the team's commitment to the wider profession.

TRUST COMPANY OF THE YEAR

The Trust Company of the Year Award is open to private client companies formed to act as a trustee or to deal with trusts.

Depending on the entries received, the judges may decide to split the category into 'midsize firm' and 'large firm' subcategories; if so, entrants will be advised of this at the shortlist stage.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Demonstrate strong management and growth within the sector.
2. Explain how the company has demonstrated excellence in client service delivery.
3. Provide examples of innovation that differentiate you from your competitors.
4. Outline the company's technical expertise and support for continuing professional development and education.
5. Demonstrate the company's commitment to the wider profession.

TRUSTED ADVISOR OF THE YEAR

This award is for the most outstanding individual in any discipline servicing private clients or an advisor, who stands out as being an expert in the field. In order to be considered for this category, the nominee will need to be a Full STEP member (TEP). STEP members may nominate themselves or be nominated by a firm or peer. Winners cannot be awarded more than once in a five-year period. Please note that shortlisted applicants may be interviewed by STEP as part of the promotion of the Awards and the applicant's submission.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Why this person stands out from other advisors in the field.
2. How this person has demonstrated a commitment to their clients. Provide supporting testimony from their clients, colleagues and/or peers.
3. This person's range of expertise.
4. This person's commitment to continued professional development and education.
5. This person's contribution to the profession.

VULNERABLE CLIENT ADVISORY PRACTICE OF THE YEAR

The Vulnerable Client Advisory Practice of the Year award recognises a legal, accountancy or other relevant private client practitioner or team that specialises in navigating the complex issues that confront vulnerable clients and their families. The entry should include the percentage of the total work that this area of work represents. Please see pca.step.org/FAQs for the definition of a vulnerable client.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following five criteria: they are equally weighted.

1. Demonstrate the development of knowledge and practice beyond the core disciplines in a way appropriate to the special issues arising when dealing with particular challenges presented by vulnerable clients, for example elderly clients and their families.
2. Provide specific examples of key cases (no more than three) that exemplify those handled over the relevant period, including matters that involved the understanding and management of the challenges facing advisors in a multicultural, multi-faith society, and that covered the range of legislative, welfare, financial and practice issues surrounding the care and advice provided to vulnerable people.
3. Provide specific examples of the type of approach taken to gain the respect and trust of clients.
4. Highlight the practice's or practitioner's range of competencies and knowledge in the vulnerable client context, such as specialist professional and academic qualifications, technical articles and papers.
5. Demonstrate excellent technical skills and support for continuing professional development and education in this specialist field.

YOUNG PRACTITIONER OF THE YEAR

This award applies to any practitioner working in the private client industry who is aged 30 years or below, being born on or after 15 April 1992. Candidates cannot enter themselves; the award is by nomination only. Both STEP members and non-members may be nominated by a firm or colleague who feels that the candidate shows great promise. This award is judged on the quality of the entries, and not the number of nominations received per nominee.

Focusing on the year 15 April 2022–14 April 2023 only, address all of the following four criteria: they are equally weighted.

1. Why this person stands out from other young practitioners in the field.
2. This person's range of expertise.
3. This person's commitment to continued professional development and education.
4. Examples of where this person is making a significant contribution.

SPECIAL AWARDS

THE GEOFFREY SHINDLER AWARD FOR OUTSTANDING CONTRIBUTION TO THE PROFESSION

The Geoffrey Shindler Award for Outstanding Contribution to the Profession applies to an individual who has made an outstanding contribution to the private client profession in the course of the last year (15 April 2022–14 April 2023). An example of why someone may win this Award would be the high level of input they have had in technical or policy consultations that have led to a significant legislative development,

or in the development of a new offering or initiative that serves to further the profession. Candidates cannot enter themselves; the award is by nomination only. Both STEP members and non-members may be nominated and entrants should provide a submission of up to 1,100 words. This award is judged on the quality of the entries, and not the number of nominations received per nominee.

LIFETIME ACHIEVEMENT AWARD

The Lifetime Achievement Award applies to an individual who has, over the course of their lifetime, made contributions of outstanding significance to the private client profession. Candidates cannot enter themselves; the award is by nomination only.

Both STEP members and non-members may be nominated by a firm or colleague and entrants should provide a submission of up to 1,100 words. This award is judged on the quality of the entries, and not the number of nominations received per nominee.

Enter online at pca.step.org

Entries close **14 April 2023**

SAVE THE DATE

STEP Private Client Awards

21 September 2023

London Hilton on Park Lane, UK

CONTACTS

AWARDS SECRETARY

Lysette Matthews

Tel: +44 (0) 20 3752 3713

Email: pca@step.org

MARKETING ENQUIRIES

Kelly Farrell

Tel: +44 (0) 20 3752 3705

Email: kelly.farrell@step.org

SPONSORSHIP OPPORTUNITIES

Tom Fountain

Tel: +44 (0)20 3771 7250

Email: tom.fountain@thinkpublishing.co.uk

PR ENQUIRIES

Liz Skinner

Tel: +44 (0)20 3752 3706

Email: liz.skinner@step.org

