

THE WORLDWIDE PROFESSIONAL  
ASSOCIATION FOR THOSE ADVISING  
FAMILIES ACROSS GENERATIONS

OUR NETWORK IS TRULY GLOBAL

<https://italy.step.org/>

# CONGRESSO NAZIONALE 2019

Luigi Belluzzo, Chair

FIRENZE 12 NOVEMBRE 2019

**STEP**   
ADVISING FAMILIES ACROSS GENERATIONS

# STEP ITALY

# STEP

Italy

ADVISING FAMILIES ACROSS GENERATIONS

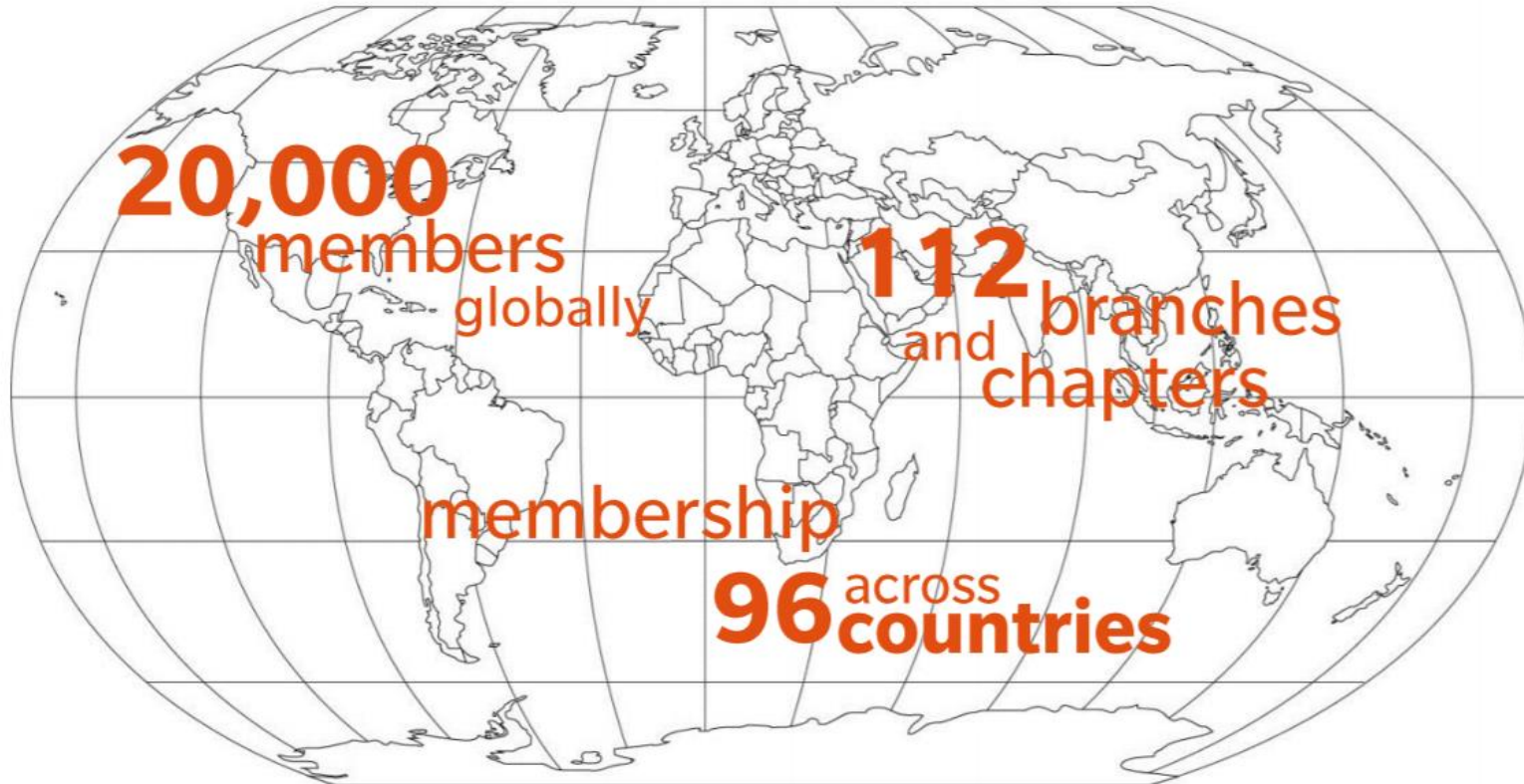
CONGRESSO NAZIONALE STEP ITALY 2019

# IL NUOVO VOCABOLARIO PER IL WEALTH PLANNING

**STEP**

ADVISING FAMILIES ACROSS GENERATIONS

# STEP WORLDWIDE



# STEP ITALY

## 2018 – 2020 TARGETS

- To gather the “*community*” of Italian professional practitioners establishing the reference for *those advising families across generations*. *Achieving the “200+” members within 2020.*
- **Cooperation** with Academy, Orders and Professional Societies in order to spread the field of Estate planning, Inheritance & Succession planning and other “TEP” issues in Italy. Reinforcing SIGs and producing effective position papers.
- Providing and *International outlook* with a strong relationship with the entire STEP network
- Establishing a “STEP Style” on all our professional activities and relationships **among members**
- Within this frame STEP offer a **peer to peer discussion groups** providing the perfect environment for research and profession, giving a pragmatic professional approach within an expert and International outlook

# OUR ORGANIZATION




- 1) Step Italy Committee
- 2) A Scientific Committee of Step Italy
- 3) A Technical Committee of Step Italy
- 4) 5 Italian SIGs:
  - (i) BUSINESS FAMILIES
  - (ii) PHILANTROPY / CHARITY / MENTAL CAPACITY
  - (iii) CROSS BORDER ESTATE
  - (iv) CONTENTIOUS TRUST AND ESTATE
  - (v) INTERNATIONAL CLIENTS

We fully cooperate with STEP WW and with Step Europe, having very good relationships with all other branches.

# → BECOMING A TEP

## WW Membership Categories

- + Full Member
- + Associated Member
- + Affiliated Member
- + Retired Member
- + Restricted Member
- + Emeritus, Honorary and Judicial Members
- + Students
- + Non Members

Exam Route	Essay Route	Expertise Route
 <p>Accumulate 240 credits through completing STEP qualifications and demonstrating relevant professional experience.</p>	 <p>If you have a relevant qualification with a minimum of five years' industry experience, demonstrate your knowledge through the completion of three essays of approximately 5,000 words each.</p>	 <p>Already hold a relevant professional qualification and a minimum of ten years' senior experience working at leadership level, complete an Expertise route application form</p>
<a href="#">Learn more</a>	<a href="#">Learn more</a>	<a href="#">Learn more</a>

## STEP ITALY Membership

We have been involved in the WW process and with the finish of the parenthood (temporary) regime for Step Italy too. **All 3 routes are now open and we “fine tuned” processes.**

For “Expertise Route” it is essential for anyone to refer to one of the member of the Step Italy Committee as it is important to guide the process.

A new article of association and a new governance.

# CURRENT ISSUES

Italian Court cases and Tax Authorities answers and resolutions are contributing to current debate about **trust & estate planning, law, tax, successions and family business issues**.

As a society **advising families across generations** we are currently debating internally and **contributing to the general understanding and positioning STEP before lawmaker, authorities and colleagues**.

STEP involves many professions in Italy (notai, avvocati, commercialisti, responsabili wealth delle principali banche e intermediari finanziari, etc) with a specific international experience.

STEP is involved in the current debate, as emerged in the last months both at lawmakers level and praxis where relevant issues are discussed about «**trust, private insurance, le società semplici o commerciali, i fondi, le operazioni di riorganizzazione societaria o propedeutiche ad investimenti o disinvestimenti**» considering issues such as **CSR/Fatca, 5AML Directive and DAC6**.

# SURVEY

We have also prepared a **SURVEY** in order to contribute to a better understanding about the legal, tax, accounting and wealth planning developments, aiming to contribute to favour Italy as a jurisdiction.



# WELCOME TO STEP ITALY 2019 CONGRESS

STEP Italy

[STEP.Italy@step.org](mailto:STEP.Italy@step.org)

Luigi Belluzzo, *Chair*

Martina Moscardi,

Giulia Cipollini, *Secretary*

Andrea Tavecchio, *Treasury*

Massimo Antonini

Marco Cerrato

<https://italy.step.org/>

