

## **STEP Elects Simon Morgan of Vistra Jersey as New Worldwide Chair**

London and Jersey – 17 October 2018

Simon Morgan TEP, Director and Head of Private Clients at Vistra Jersey, has been elected worldwide Chair of STEP, effective 1 January 2019.

STEP is the global professional association for practitioners who specialise in family inheritance and succession planning. Founded in 1991, and with more than 20,000 members, STEP is widely recognised by employers, policymakers and the public.

Simon has been in the international fiduciary business since 1982, working in Jersey and the Cayman Islands. He has been a member of STEP since 1994, is a Fellow of the Chartered Institute of Financial Services (London Institute of Banking & Finance), and was named in the CityWealth Honours list and *Who's Who Legal* as one of the world's leading practitioners in his field.

He has held numerous leadership roles within STEP over the years, serving as former chair of the largest branch, STEP Jersey, joining the worldwide Council in 2013, and the Board in 2017, where he served as deputy chair.

On his appointment, Simon noted, 'I am honoured to be elected Chair and I am excited to serve STEP in the next stage of its evolution. I'll do my utmost to support the member journey, the regions, our wonderful worldwide secretariat and the rest of my fellow board members, to maintain and uphold the vision, mission and values of STEP.'

Vistra, a leading global trust, corporate service and fund administration provider, is a STEP Employer Partner, and is delighted with the appointment. Executive Chairman, Simon Hinshelwood said, 'This appointment is a testament to Simon's expertise and long-standing commitment to the industry and STEP. We are honoured to support him as he accepts this new role and are confident that under his leadership, STEP will continue to flourish in achieving its mission.'

Outgoing STEP Chair, Patricia Wass TEP, welcomed Simon's appointment, 'Simon and I have worked together for a number of years and I have every confidence in his commitment to STEP. I congratulate him on his appointment and wish him all the best in the role.'

STEP's Board of Directors is responsible for the high-level strategic direction of the Society, and its members have legal authority and responsibility for the organisation. Board members are elected by members of STEP's worldwide Council.

Two deputy chairs will also be appointed. Elections for these roles began on Monday 15 October.

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### **About Vistra**

Ranked in the top three corporate service providers globally, Vistra is a versatile group of professionals, providing a uniquely broad range of services and solutions. Our capabilities span across company formations to trust, fiduciary, private client services, and fund administration. Vistra employs over 4,000 employees across 46 jurisdictions. For more information, please visit [www.vistra.com](http://www.vistra.com).

### **About STEP**

STEP is the global professional association for practitioners who specialise in family inheritance and succession planning. STEP works to improve public understanding of the issues families face in this area and promotes education and high professional standards among its members. STEP members help families plan for their futures, from drafting wills to issues surrounding international families, protection of the vulnerable, family businesses and philanthropic giving. Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience.

Find out more at [www.step.org](http://www.step.org)