

# BRAND GUIDELINES

# SIMPLY KNOWN AS STEP

Welcome to our new brand guidelines – the next, exciting chapter in our development as both an organisation and a brand.

Faced with the realisation that our old brand no longer reflected us as a society, we undertook a branding exercise to develop a style, tone of voice and visual identity that represented us as a professional, international and outward facing organisation. We also needed to adapt to the new media platforms that we use to communicate, so needed a brand that performed across both print and digital.

Key to this process was to keep hold of our heritage. As an established organisation we wanted to acknowledge our history, but at the same time appeal to those new to STEP.

As a result we have evolved our brand to one that presents us as a credible, established and modern organisation.

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TONE OF VOICE

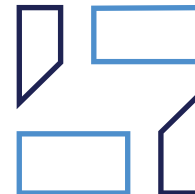
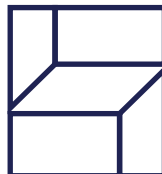
LOGO

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## LOGO DEVICE

The STEP Logo Device is the bridge between the old brand and the new. It signifies both our heritage and the evolution of our brand.

The Logo Device will play an important role in representing STEP in digital media.





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## LOGO

The STEP logo has been modernised to work across both print and digital media.

The full name has been removed and the font replaced with a strong, modern and clear typeface. A strapline has been introduced to represent the core value of our organisation, written in one of the new colours introduced to the brand.

The STEP logo with the strapline should be used whenever possible and is the preferred version to be shown.



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## SIZE

The STEP logo should never be used under 40mm width when printed, and 90px when shown online.





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## EXCLUSION ZONE

To preserve the integrity of our brand, the STEP logo should always have an area which is kept free of any other information.

The Logo Device should be used as the measurement to determine the exclusion zone.

The exception to this rule is the placement of the logo on web banners, where the size and positioning will determine the exclusion zone allowed.



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## ALTERNATIVE USAGE

The STEP logo can also be used without the strapline, and in white on a coloured background when more appropriate.

Please contact the Marketing team if you wish to use the STEP logo in a format that isn't covered in these guidelines.



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## LOGO RULES

1. Don't change the colours
2. Don't crop any part of the logo
3. Don't add a drop shadow
4. Don't resize the logotype elements
5. Don't add a stroke
6. Don't sit the full colour logo on an image/coloured background
7. Don't remove the logo icon
8. Don't stretch the logo
9. Don't compress the logo



## REGIONS AND BRANCHES

We have developed versions of the STEP logo for individual STEP Regions and Branches to use. Our STEP light blue band should always be used when creating a new identity for a Region, and our STEP dark blue band should always be used when creating a new identity for a Branch.

Please contact the Marketing team if you wish to create a new Region or Branch identity.



ADVISING FAMILIES ACROSS GENERATIONS



ADVISING FAMILIES ACROSS GENERATIONS

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## SPECIAL INTEREST GROUPS

All the Special Interest Groups (SIGs) have their own brand logo, with an example shown opposite.

The name of the SIG must always sit within the STEP orange band, and include the words 'SPECIAL INTEREST GROUP'.



# LOGO USAGE

## Who can use the STEP logo?

- Full STEP members (TEP) only.

## Where can members use the logo?

- Full members can use the logo on their individual firm business card. The logo is not allowed on the firm business card template used by all employees. The logo should only be used in relation to the STEP member.
- Sole practitioners (full STEP members) may use the logo on their letterhead, website, advertisements and marketing material. This also applies to sole practitioners practising through a corporate vehicle.
- Full members may use the logo within a biographical profile within their firm's website and promotional material.
- Full members can use the logo in their email footer. Please note the logo can only be used on the full members' personal email signature, not the firm footer template.
- The logo can be used on a firm's letterhead, advertisements and marketing materials, providing the full member(s) of STEP are referenced. This should be done by either listing the full member(s) next to the logo or directing the header to a dedicated page on the firm's website where TEPs are listed. The firm will be responsible for keeping this up-to-date.
- Local STEP Branches and Chapters may use the logo on all communications (email, print fliers etc) and promotional materials that provide details for STEP Branch or Chapter activities.

## STEP member logo usage is NOT allowed for the following:

- The logo should not be used within the homepage of a firm's website.
- The logo should not be used within a firm's newsletter (print or email) where it may imply that the firm is a member of STEP.
- The logo may not be included on any materials that imply a STEP endorsement of a particular firm, product or service.
- The logo should not be used on any promotional materials that do not include a reference to the TEPs employed by the firm.
- At no time should the logo be used to imply the firm is a member of STEP. The names of the STEP members within the firm should always be stated clearly.

## How to use the logo:

- The logo should be no smaller than 1.32cm high x 2.75cm wide when it is used by a member.
- The logo should always be at least 30% smaller than the firm's logo.

## Who cannot use the STEP logo?

- Anyone who is not a full member (i.e. TEP) of STEP.
- Students, technicians, affiliates, retired members, friends of STEP and all those who are currently suspended cannot use the STEP logo or TEP designation.
- Any group, individual or firm who has not received prior consent from the STEP management team.

COLOUR

## COLOUR

The STEP brand is comprised of two primary blues, supplemented by four secondary colours.

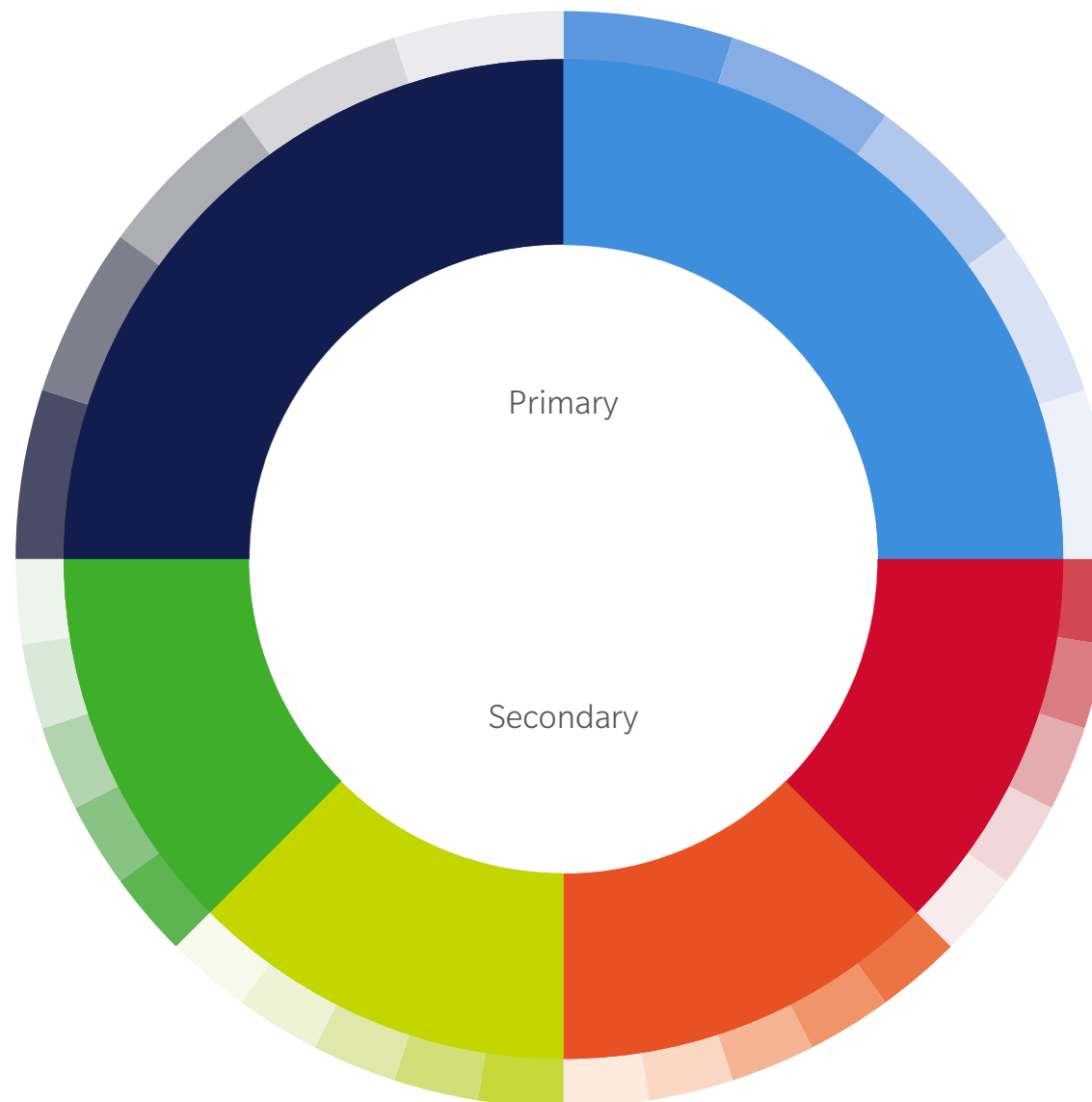
The primary colours represent our core brand and should always be used across all media. The secondary colours are used to reinforce the brand and promote key messages and products.

In addition to these six colours, we allow the use of grey in body copy.

85% grey is to be used for all body copy text.

The preferred method of printed Pantone colours is coated. If printing Pantone on uncoated paper, consult with the printer for the best Pantone uncoated colour reference and material finish.

85%





Coated: Pantone® 2766

**C**100 **M**96 **Y**36 **K**33

**R**23 **G**33 **B**84

#172154

Coated: Pantone® 186

**C**13 **M**100 **Y**90 **K**4

**R**204 **G**9 **B**47

#cc092f

Coated: Pantone® 361

**C**77 **M**2 **Y**100 **K**0

**R**46 **G**177 **B**53

#2eb135

Coated: Pantone® 279

**C**69 **M**35 **Y**0 **K**0

**R**72 **G**145 **B**220

#4891dc

Coated: Pantone® 1665

**C**6 **M**86 **Y**100 **K**0

**R**226 **G**73 **B**18

#e24912

Coated: Pantone® 382

**C**31 **M**1 **Y**100 **K**0

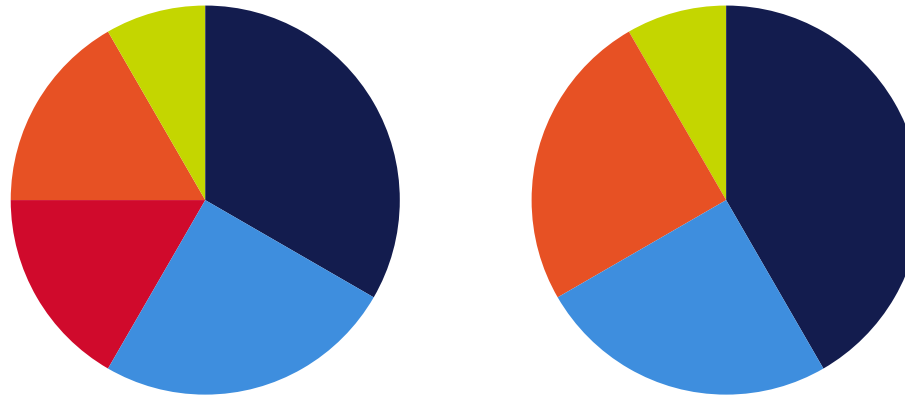
**R**190 **G**214 **B**0

#bed600

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## COLOUR PALETTE

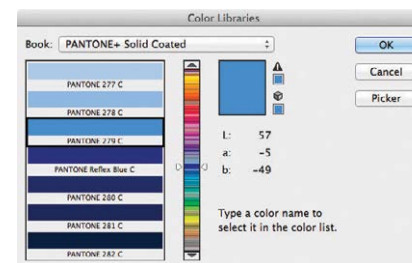
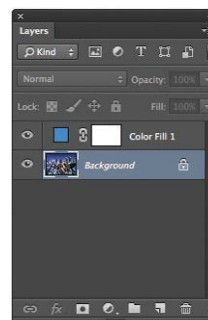
When using our colours a balance must be created to maintain the look and feel of our brand. There must be a higher use of the primary colour blues, which together should cover between 50-70% of the colours shown, and the secondary colours should only be used to compliment and support key messages.



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## OVERLAY

The colours can be used to create a colour wash used over an image. An example is shown opposite, along with the technique used to achieve the effect.



TYPOGRAPHY

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## TYPOGRAPHY

Our corporate typeface is Slate Std. Flexible, easy to read, open and accessible, Slate Std is suited to a wide range of visual communications.

Levels of typographic hierarchy are defined both for impact and clarity in our communications.

Use Slate Std for all STEP printed communications where possible.  
Use Slate Std in rendered form for online and electronic applications.

When use of Slate Std is not possible, use the recommended system typeface Arial.

The weights shown for Slate Std are approved for use.

Arial

ABCDE  
abcde  
12345

We use Arial for all Word documents and digital applications like email, PowerPoint documents and our website.

Slate Std Bold

Aa Bb Cc 1 2 3

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Slate Std Regular

Aa Bb Cc 1 2 3

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Slate Std Light

Aa Bb Cc 1 2 3

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

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## FONT USES

The examples opposite show the approved uses of Slate Std. We have built in a range of sizes to accommodate the various communications we produce, allowing for a more flexible layout.

Primary headers and sub headers are to be written in CAPS as shown opposite. Secondary headers and pull quotes are to be written in sentence case.

# THIS IS SLATE STD LIGHT HEADER.

It can be used in sizes of 50pt – 55pt.

## This is Slate STD Regular Header 2.

It can be used in sizes of 14pt – 20pt.

### THIS IS SLATE STD BOLD SUB HEADER.

It can be used in size of 12pt – 16pt.

### This is Slate STD Regular Pull-Quote.

It can be used in size of 12 – 16pt.

### This is Slate STD Regular Copy.

It can be used in size of 9 – 12pt.



IMAGERY

# LIFESTYLE IMAGERY

Lifestyle imagery can be used when we are communicating to the general public.

It is important that the imagery chosen follows these set rules:

- 1. The image reflects a situation that shows the benefit of using a STEP member or service
- 2. The image is light, bright and always has a human element i.e. not generic nature
- 3. None of the subjects in the photograph should be looking at the camera in a posed set-up, the shot should feel natural. The exception to this is if the subject has been ‘caught’ and the shot doesn’t feel staged.
- 4. The imagery can be used as a full-bleed image, however, when used smaller, must sit within the STEP shape\*

\*See chapter on Grids

## ADVISING FAMILIES ACROSS GENERATIONS



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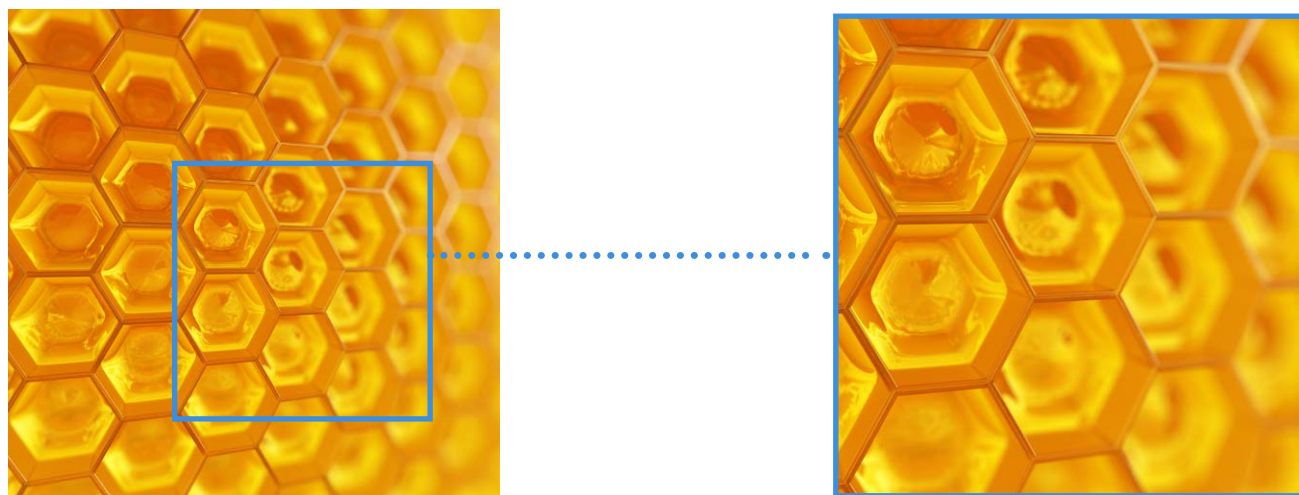
## ABSTRACT IMAGERY

For b2b communications we have introduced the use of abstract imagery.

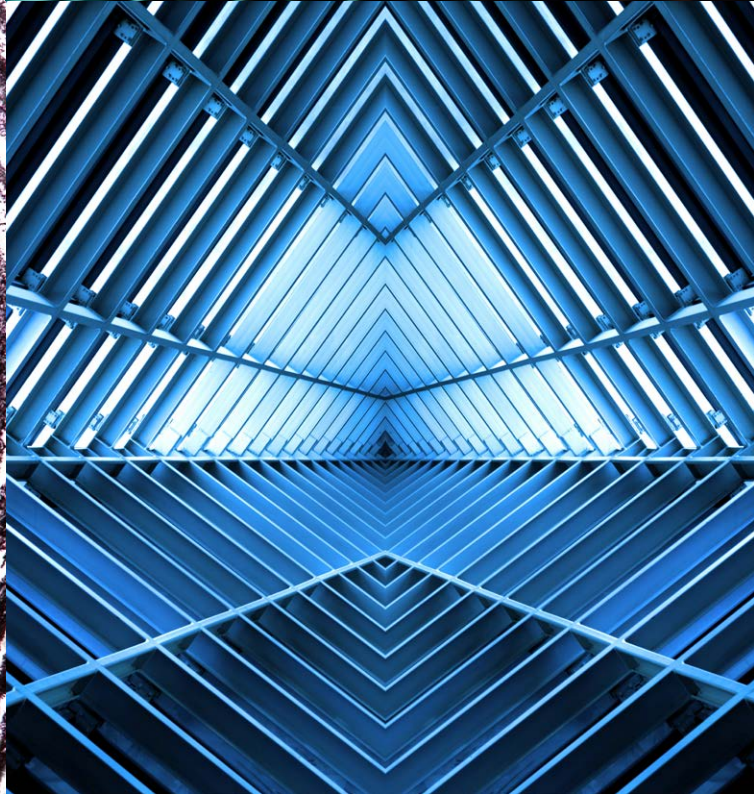
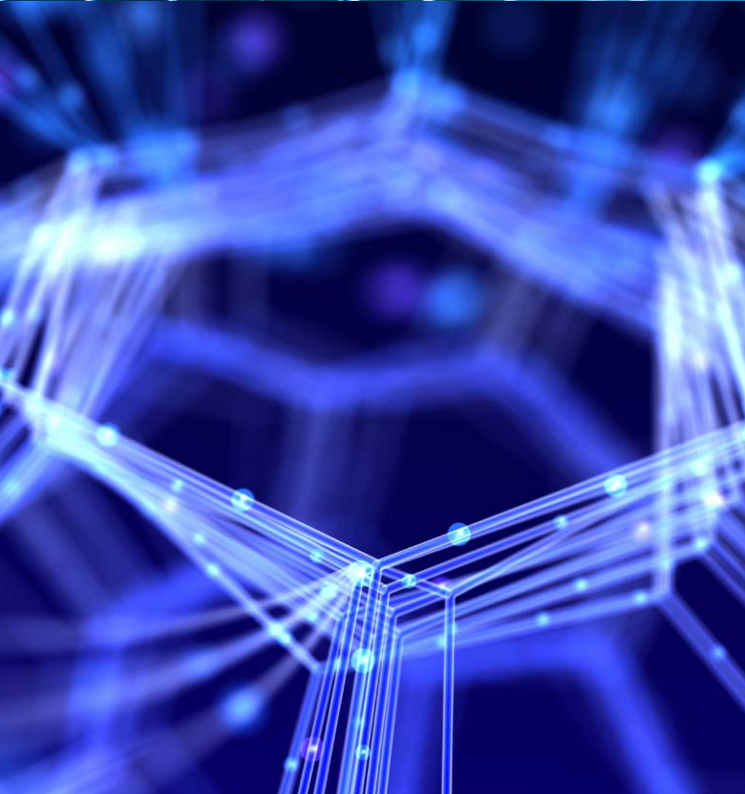
The imagery must match key criteria:

1. The image must reflect one or all of the following motivators – connect, communicate and community
2. The image must show a macro portrait of the subject
3. The final image must be overlayed by one, or a combination of, our primary colours, with the option of introducing one of the secondary colours in a gradient
4. The imagery can be used as a full-bleed image, however, when used smaller, must sit within the STEP shape\*

\*See chapter on Grids









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## EVENT AND SOCIAL MEDIA IMAGERY

For our conferences and events we will continue to use photography of the country/city the event is being held in.

Where possible, the photography should reflect the nature of the conference.

The final image must be overlayed by one, or a combination of, our primary colours, with the option of introducing one of the secondary colours in a gradient

The imagery must sit within the STEP shape\* and not be used as full bleed.

These images are also suitable to use as a backdrop to social media banners.

\*See chapter on Grids









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## PROFESSIONAL DEVELOPMENT IMAGERY

Our professional development materials have a three-tiered approach to imagery that reflects the nature of our courses:

### **Entry**

For entry-level courses, the block-balancing game imagery symbolises the entry-level approach to professional development.

### **Diploma**

For diploma courses, the maze symbolises 'finding the right way' and a technical approach to professional development.

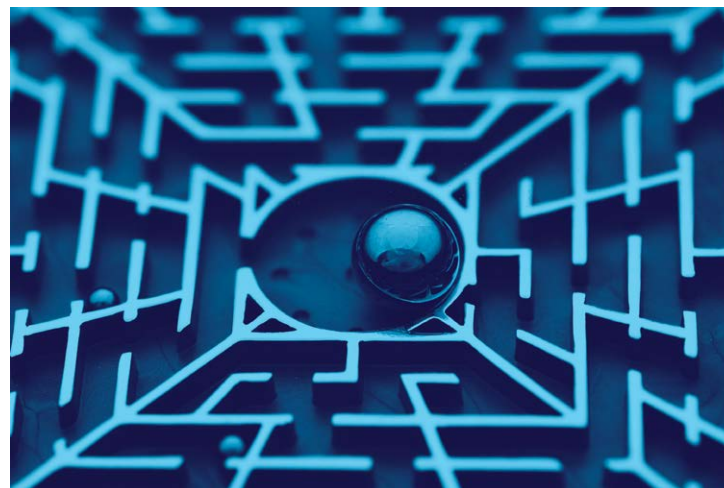
### **Specialism**

For courses that focus on a specialist area and provide a multiple-discipline approach, the strategy board game imagery symbolises a strategic approach to specialist areas of practice and professional development.

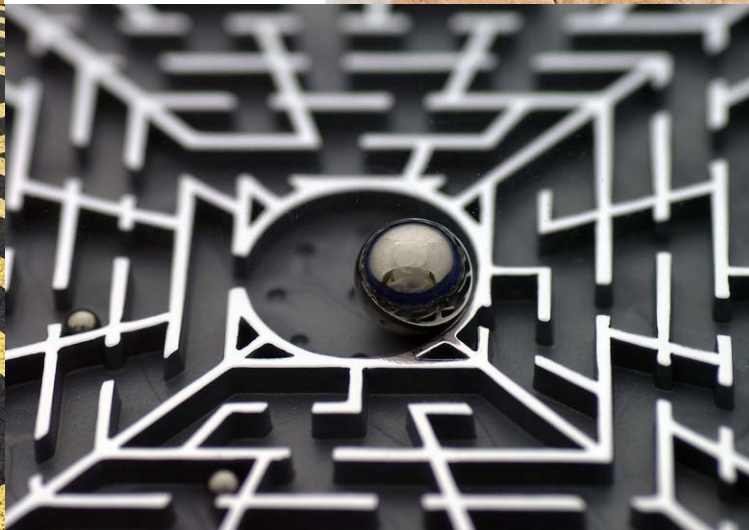
A blue gradient map can be applied to images to allow for greater visual impact.

The imagery must sit within the STEP shape\* unless used as a full bleed image.

\*See chapter on Grids.



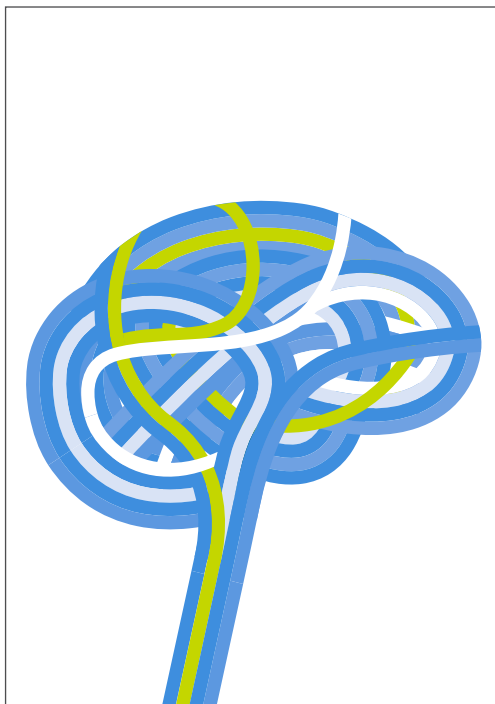




## ILLUSTRATIONS

The purpose of our illustrations is to simply communicate a message. The style should be 2D and make use of the full spectrum of colours we have introduced. They should remain simple in structure, so stay clear of over-complicated or detailed drawings, or those that contain over-shading.

They can be used both as a front-cover image, and as supporting icons within a document, either in print or online.





GRID

## GRID LAYOUT PORTRAIT

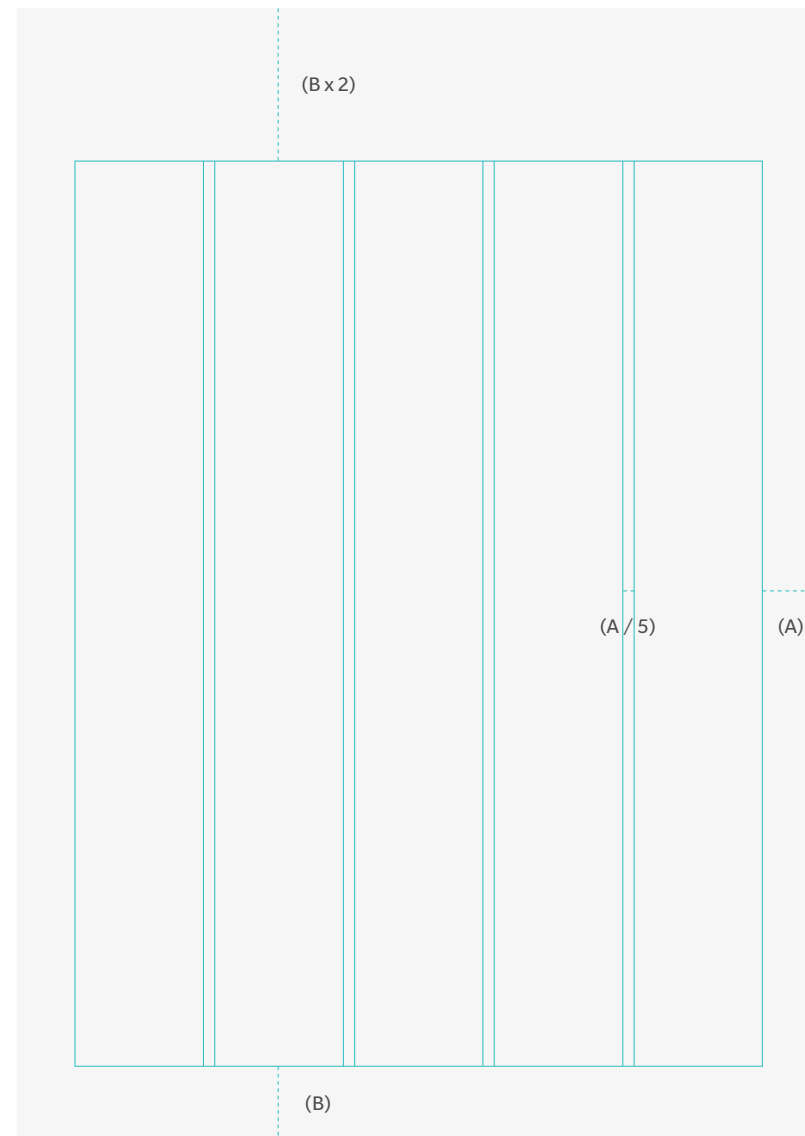
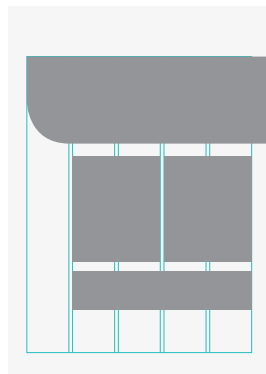
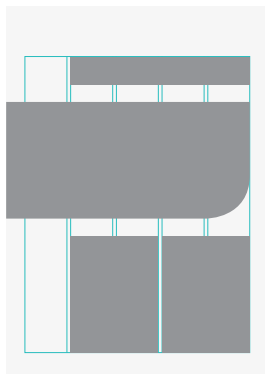
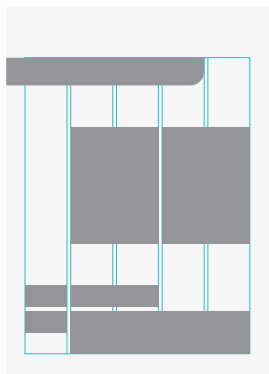
We have introduced a five-column grid that must be used across all print media. The margins have a simple calculation and will help with the structure and overall design of the page. The five columns allow for greater flexibility and fluidity on the page.

Minimum margin size:

A4: 10mm

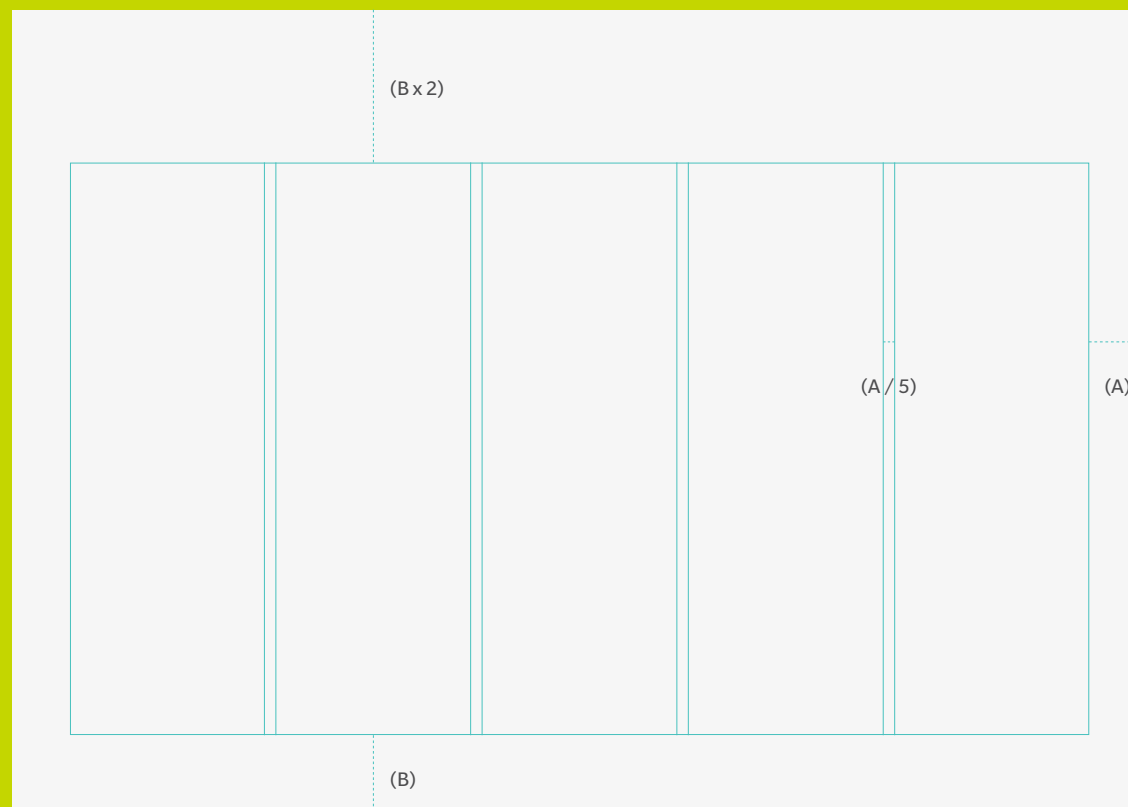
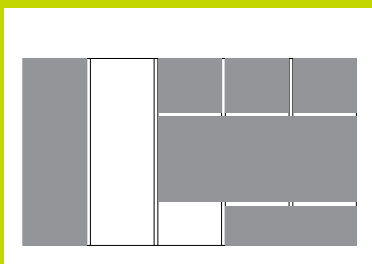
A5: 6mm

A6: 3mm



## GRID LAYOUT LANDSCAPE

The landscape grid structure follows the same rules as portrait layouts.



## COVER PAGE

The front covers opposite show two examples of how the brand can be implemented, using bleed imagery and the STEP shape to introduce the title.



## BROCHURE SPREAD

The key to a successful spread is to maximise the use of white space, using the five column grid to create negative space around text and imagery. Secondary colours should be used to pull out important messages and bring out copy against an image.

# ADVISING FAMILIES ACROSS GENERATIONS



### AGNIENIAME NONSECA ERIBUS EXERI OPTAMUS DIS AS EATIO BLABORIO ODIIT IL MAIORERSPE CUM DUNT

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## FULL PAGE ADVERT

The example opposite shows how we can use our imagery and colours to produce a bold visual, with a strong, clear message.

**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS

# BOOST YOUR CAREER

WITH THE STEP DIPLOMA  
IN TRUSTS & ESTATES

View the syllabus at [www.step.org/pd](http://www.step.org/pd)  
or [www.clint.com/stepdiplomaew](http://www.clint.com/stepdiplomaew)

**This Diploma will enable you to:**

- Enhance your ability to give holistic advice to clients as a 'trusted advisor'
- Demonstrate knowledge of the most up-to-date issues affecting trusts and estates
- Arm yourself with a qualification recognised by everybody working in the private client community
- Become a full member of STEP and use the TEP designation
- Top-up your qualification into a BSc honours degree with Manchester Business School

## HALF PAGE ADVERT

The STEP shape is easily adapted to work across smaller advertising spaces.



**BOOST YOUR CAREER**

**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS

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- Become a full member of STEP and use the TEP designation
- Arm yourself with a qualification recognised by everybody working in the private client community
- Top-up your qualification into a BSc honours degree with Manchester Business School

## STATIONERY

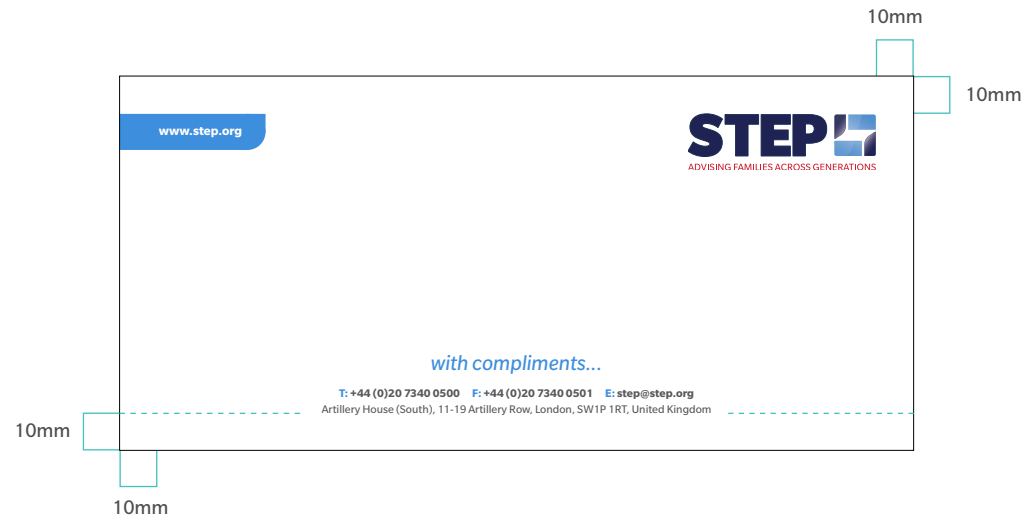
Letterheaded paper





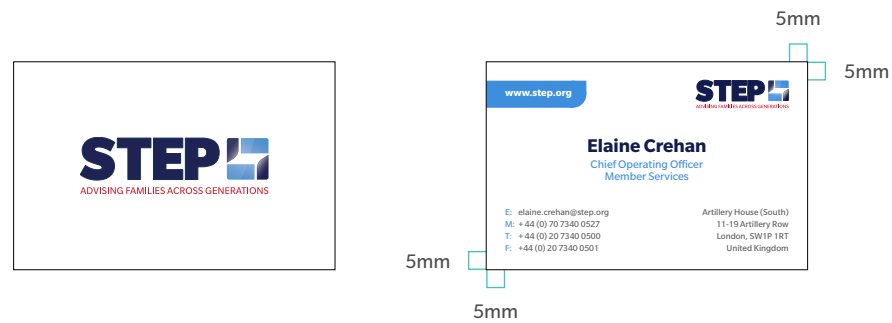
## STATIONERY

Compliments slip



## STATIONERY

Business cards



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## THE STEP SHAPE

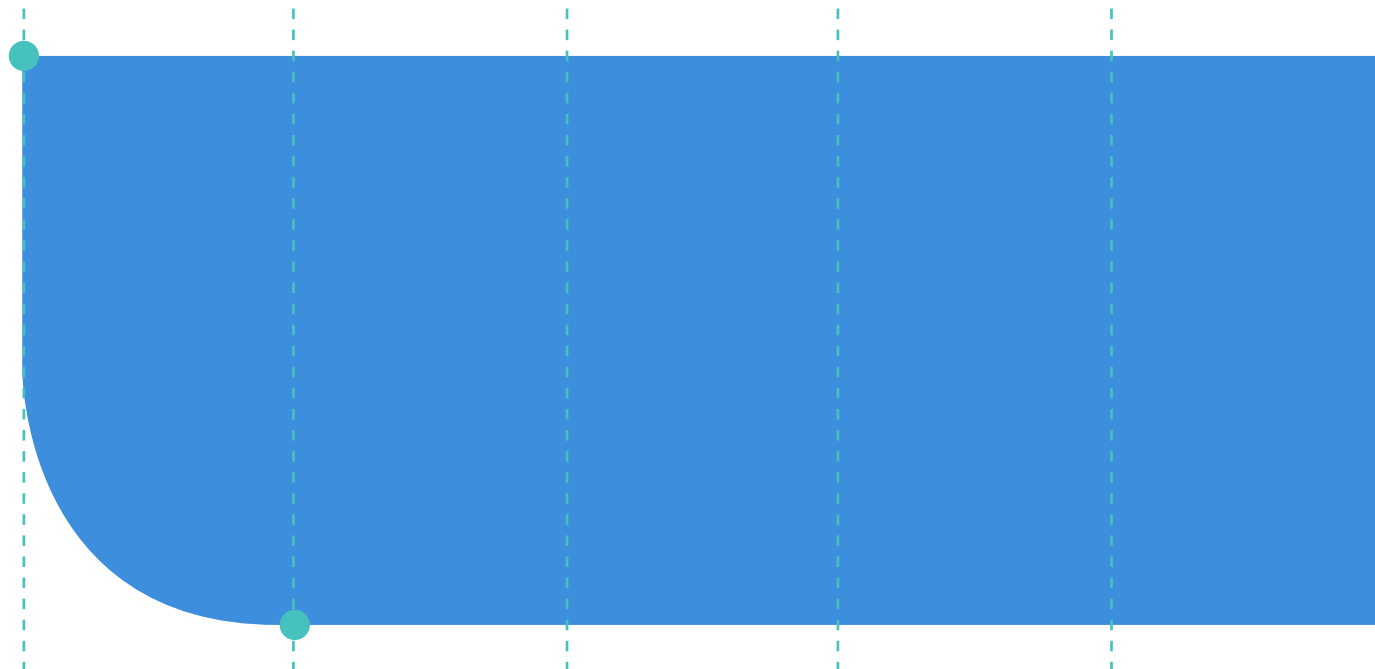
Derived from the STEP Logo Device, we have introduced a new graphic style that can be used across all media – we call this the STEP shape.

The STEP shape will become a strong visual device to bring out core messages and copy. It will also be used to contain imagery, and is flexible enough to work across a page, regardless of the orientation of the artwork.

The STEP shape can be created by using the grid system in InDesign. Select the Single Edge Tool to drag inwards the corner of the outside edge you wish to curve to rest at the nearest column.

To create the STEP shape for titles and thinner columns of text you can use the following method (shown opposite):

Draw an isometric circle the same height of the box. Place it against the corner you want to curve inwards. Select the Pathfinder Tool to subtract part of the shape and then merge the circle to the box.



DIGITAL

## SOCIAL MEDIA

The STEP Logo Device will be used as an avatar across all our social media channels, with the logo incorporated within the banner itself.

The imagery will feature a location shot of the STEP region or branch that is running the channel.

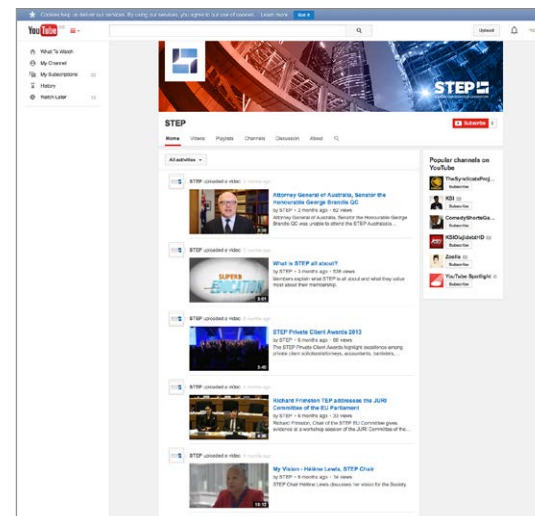
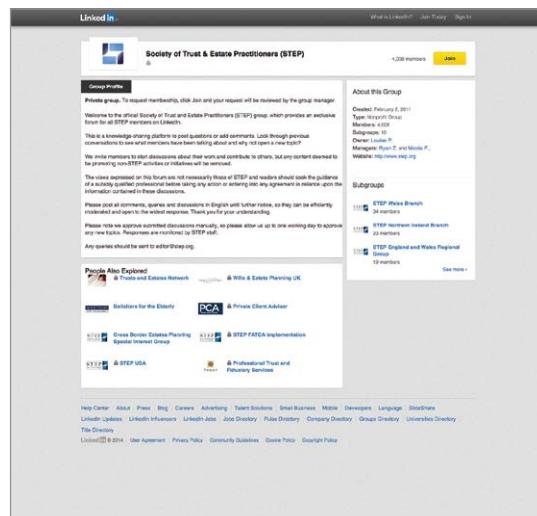
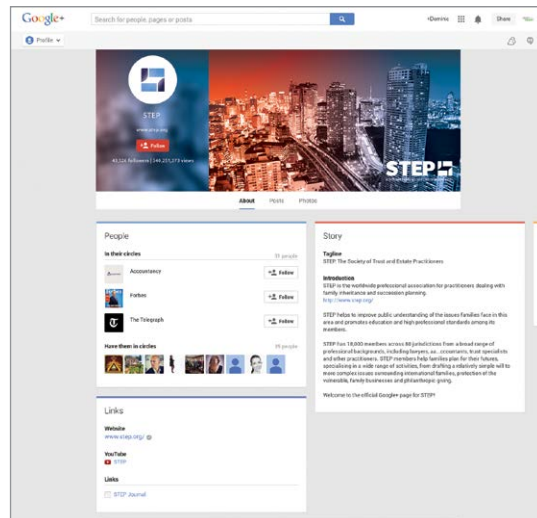
In the case of our main channels, a bespoke illustration will be created to show our worldwide presence.

The STEP Logo Device can be used by regions and branches as an avatar, with the addition of their name at the bottom (an example is shown below).



Canada





## E-NEWSLETTERS

Our new header banners are flexible, making full use of our colour palette to allow for stand out in our various e-newsletters.

Background imagery can be chosen dependent on purpose and audience



## POWERPOINT



## POWERPOINT HEADER

### EVEROVIDERUM ET HITATAS

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## EMAIL SIGNATURE

NAME | Title



Artillery House (South) | 11-19 Artillery Row | London, SW1P 1RT | United Kingdom  
T + 44 (0) 11 2222 3333 | Ext + 44 (0) 11 2222 3333 | F + 44 (0) 11 2222 3333

[f](#) [in](#) [v](#) website | vCard

Advert / promotion space



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## WEB BANNERS

Our web banners need to show a clear message, with strong brand positioning.





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## WEB BANNERS

Below is an example of three stages to an animated MPU web banner.





PROMOTIONAL

## PROMOTIONAL MATERIAL

The next two pages show examples of various promotional material.

Please contact the Marketing team if you wish to discuss producing any promotional material.



TONE OF VOICE

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Our tone of voice is the way we talk to people – face to face, in print or online. Whenever you are communicating on behalf of STEP it should be in STEP's tone of voice.

## TALKING AS THE BRAND

When writing for STEP it's not you as an individual doing the talking. It's the brand doing the talking, in the brand's tone of voice.

When we are referring to STEP in text we will usually refer to ourselves in the first person, as 'we': 'we' are talking to 'you', as a singular individual.

And remember, you are talking to real people, not arbitrary market groups. It is a conversation between two people; we are not talking to 'students', 'members', 'stakeholders' or anyone plural.

Write conversationally – picture your audience and write as if you were talking to them one-to-one. A good way to tell if your writing is 'on brand' is to read it out loud. If it sounds natural then you've probably hit the right note.

## KEEPING IT SIMPLE

Try not to use formal or long words when easy or short ones will do. Where you need to use technical terms, you can. They're not jargon. You just need to explain what they mean the first time you use them. It is important that we present complicated information simply so that it is easily understood.

## WRITING FOR DIFFERENT CHANNELS

Our tone of voice should remain the same whether you are writing for a promotional brochure, a press release, a piece of copy for the website or a research report. It may flex according to your audience or channel, and the emphasis may change whether you are writing for editorial, promotional or information purposes, but the tone should remain 'STEP'.

## HOW WE TALK ABOUT WHAT WE DO AND WHO WE ARE

### **We are 'professional'**

We speak with the authority of a global professional association. We are knowledgeable and informed, credible and trustworthy. Though we are global, we speak person-to-person. Our voice is active and involving.

### **We are 'international'**

In our global communications we speak as global citizens – with no obvious affiliation to one country over another, no matter where we are based. We are unbiased, and always address topics in an international context. We avoid the colloquial in favour of internationally understandable language and references. If we are just talking to one region, we adapt our language to suit.

### **We are 'outward facing'**

We are always aware of our audiences and what they need to know from us. We sound like a person, not an organisation. This means we can explain the complex in a simple, but not simplistic way. We are inclusive, friendly, direct and clear.

[www.step.org](http://www.step.org)

For further details in relation to STEP Brand Guidelines or other marketing enquires, please contact: [marketing@step.org](mailto:marketing@step.org)

Telephone: [+44 \(0\)20 7340 0500](tel:+442073400500)

Fax: [+44 \(0\)20 7340 0501](tel:+442073400501)

Email: [marketing@step.org](mailto:marketing@step.org)

STEP Worldwide  
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11-19 Artillery Row,  
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United Kingdom

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ADVISING FAMILIES ACROSS GENERATIONS