

Audit Committee

Chair

Peggy Gates-Hammond CA, CFP, TEP

BMO Harris Private Banking
1600 - 5151 George Street
Halifax, NS B3J 3C4

Branch: Atlantic
Tel: 902-421-3910
Fax: 902-421-3187
Email: Peggy.gates-hammond@bmo.com

Chris Ireland CA TEP

PPI Advisory
4370 Still Creek Dr, Suite 210
Burnaby, BC V5C 0G5

Branch: Vancouver
Tel: 604-909-1367
Fax: 604-688-8924
Email: cireland@ppi.ca

Robin MacKnight LLM, TEP

Wilson Vukelich LLP
60 Columbia Way, Suite 710
Markham, ON L3R 0C9

Branch: Toronto
Tel: 905-940-0516
Fax: 905-940-8785
Email: rmacknight@wvllp.ca

Christine Van Cauwenberghe CFP, TEP

Investors Group
447 Portage Avenue
Winnipeg, MB R3C 3B6

Branch: Winnipeg
Tel: 204-956-8427
Fax: 204-943-0021
Email: c.vancauwenberghe@investorsgroup.com

Michael Dodick

Chief Operating Officer, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext. 223
Fax: 416-491-9499
Email: mdodick@step.ca

Awards Committee

Chair

Beaty Beaubier QC, TEP

Stevenson Hood Thornton Beaubier LLP
500, 123 - 2nd Avenue South
Saskatoon, SK S7K 7E6

Chapter: Saskatchewan
Tel: 306-244-0132
Fax: 306-653-1118
Email: bbeaubier@shtb-law.com

Sally Dennis BA, LLM, TEP

Farris Vaughan Wills Murphy LLP
2500, 700 West Georgia St.
Vancouver, BC V7Y 1B3

Branch: Vancouver
Tel: 604-661-9327
Fax: 604-661-9349
Email: sdennis@farris.com

William Fowlis QC, FCA, TEP

Miller Thomson LLP
3000, 700 - 9 Avenue S.W.
Calgary, AB T2P 3V4

Branch: Calgary
Tel: 403-298-2413
Fax: 403-262-0007
Email: wfowlis@millerthomson.com

Kathryn Charr MTI, TEP

TD Wealth
10088 - 102 Ave NW
Edmonton, AB T5J 2Z1

Branch: Edmonton
Tel: 780-408-6122
Fax: 780-448-8160
Email: kathryn.charr@td.com

Larry Frostiak, FCA, CFP, TEP

Frostiak & Leslie Chartered Accountants
200-1700 Corydon Avenue
Winnipeg, MA R3N 0K1

Branch: Winnipeg
Tel: 204-487-4449
Fax: 204-488-8658
Email: lfrostiak@cafinancialgroup.com

Barry Gorman, CA, TEP

35 Tremont St
Dartmouth, NS B2Y 1X1

Branch: Atlantic
Tel: 902-469-0229
Email: lgorman@ns.sympatico.ca

Marilyn Piccini Roy BCL, PhD, TEP

Robinson Sheppard Shapiro LLP
800 du Square Victoria Suite 4600
Montreal, QC H4Z 1H6

Branch: Montreal
Tel: 514-393-4034
Fax: 514-954-1905
Email: mpicciniroy@rsslex.com

Margaret O'Sullivan LLB, TEP

TD Bank Tower #3430 - 66
Wellington St W P.O.Box 68
Toronto, ON M5K 1E7

Branch: Toronto
Tel: 416-363-3700
Fax: 416-363-9570
Email: mosullivan@osullivanlaw.com

Michael Dodick

Chief Operating Officer, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext. 223
Fax: 416-491-9499
Email: mdodick@step.ca

Janet Gerongco

Education Coordinator, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext. 229
Fax: 416-491-9499
Email: education@step.ca

Education Committee

Chair

Peter Weissman CPA, CA, FCA, TEP

Cadesky Tax
Exchange Tower, 130 King St W
Suite 2300, Box 233
Toronto, ON M5X 1C8

Branch: Toronto
Tel: 416-644-1481
Fax: 416-594-9501
Email: pweissman@cadesky.com

Elaine Blades, LLB, TEP

RBC Centre 155 Wellington Street
Toronto, ON M5V 3K7

Branch: Toronto
Tel: 416-313-7410
Email: elaine.blades@rbc.com

Sarah Dykema TEP

McInnes Cooper
1300-1969 Upper Water Street
Purdy's Wharf Tower II
Halifax, NS B3J 2V1

Branch: Atlantic
Tel: 902-423-8157
Fax: 902-425-6350
Email: sarah.dykema@mcinnescooper.com

Thomas Grozinger LLB, TEP

Royal Trust Corporation of Canada
90 Sparks St, Suite 300
Ottawa, ON K1P 5T6

Branch: Ottawa
Tel: 613-239-3045
Fax: 613-239-3218
Email: thomas.grozinger@rbc.com

Lisa Handfield LLM, CGA, TEP

National Bank Trust
239-8th Avenue SW
Calgary, AB T2P 1B9

Branch: Calgary
Tel: 403-531-8485
Email: lisa.handfield@nbc.ca

Marilyn Piccini Roy BCL, PhD, TEP

Robinson Sheppard Shapiro LLP
800 du Square Victoria Suite 4600
Montreal, QC H4Z 1H6

Branch: Montreal
Tel: 514-393-4034
Fax: 514-954-1905
Email: mpicciniroy@rsslex.com

Genevieve Taylor TEP

Legacy Tax + Trust Lawyers
510-609 Granville St, PO Box 10326
Vancouver, BC V7Y 1G5

Branch: Vancouver
Tel: 604-631-1254
Fax: 604-683-6953
Email: gtaylor@legacylawyers.ca

Brad Severin CA, CFP, TEP

Bradley D. Severin Professional Corp.
741 Estate Drive
Sherwood Park, AB T5J 3N5

Branch: Calgary
Tel: 403-570-0188
Fax: 403-570-0188
Email: bseverin@shaw.ca

Craig Dale CPA, CA, TEP

RBC Dominion Securities
101-3125 Capilano Crescent
North Vancouver, BC V7R 4X5

Branch: Vancouver
Tel: 604 981 6681
Fax: 604 230 9953
Email: craig.dale@rbc.com

Meghan Davis CPA, CA, TEP

Collins Blay LLP
27 Princess St., Suite 410
Kingston, ON K7L 1A3

Branch: Ottawa
Tel: 613 546 3111
Fax: 613 546 4089
Email: mdavis@collinsblay.com

Michael Dodick

Chief Operating Officer, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext.223
Fax: 416-491-9499
Email: mdodick@step.ca

Janet Gerongco

Education Coordinator, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext.229
Fax: 416-491-9499
Email: education@step.ca

Governance Committee (TBD)

Chair

Rachel Blumenfeld BA, MA, LLB, TEP

Aird & Berlis LLP

Brookfield Place, 181 Bay Street

Suite 1800, Box 754

Toronto, ON

M5J 2T9

Branch:

Toronto

Tel:

416.865.3413

Fax:

416-863-1515

Email:

rblumenfeld@airdberlis.com

Michael Segal LLB, TEP

Michael D. Segal Professional Corporation

343 Preston Street

Ottawa, ON

K1S 1N4

Branch:

Ottawa

Tel:

343-291-1041

Fax:

343-291-1001

Email:

msegal@mdsegal.ca

Brian Cohen LLB, TEP

Gowling WLG

100 King St W, Suite 1600

Toronto, ON

M5X 1G5

Branch:

Toronto

Tel:

416-862-5715

Fax:

Email:

brian.cohen@gowlingwlg.com

REST OF THE MEMBERS TBD

Member Services Committee

Chair

Leanne Kaufman LLM, TEP

RBC Wealth Management
Estate & Trust Services
RBC Centre-155 Wellington St W, 20th flr
Toronto, ON M5V 3K7

Branch: Toronto
Tel: 416-956-9344
Fax: 416-955-5101
Email: Leanne.kaufman@rbc.com

Florence Carey LLB, TEP

Aikins MacAulay & Thorvaldson LLP
30th Floor, 360 Main Street
Winnipeg, MB R3C 4G1

Branch: Winnipeg
Tel: 204-957-4891
Fax: 204-957-4414
Email: fic@aikins.com

Laxmee Cundasawmy BA (Hons), ACIS, TEP

1709 College Lane SW
Calgary, AB T2S 2G9

Branch: Calgary
Email: laxmee@telus.net

Nathalie Fiset-Caza D Fisc, F PI, MBA, TEP

RBC Wealth Management Services
1 Place Ville Marie,
Suite 300
Montreal, QC H3B 4R8

Branch: Montreal
Tel: 514-878-4133
Fax: 514-878-7802
Email: nathalie.fiset-caza@rbc.com

Sara Johnson TEP

BMO Private Banking
327 Bernard Avenue
Kelowna, BC V1Y 6N6

Branch: Okanagan
Tel: 250-317-0276
Email: sara.johnson@bmo.com

Marina Panourgias CA, TEP

Canadian Revenue Agency
1 Front St W
Toronto, ON M5J 2X6

Tel: 416-973-9524
Email: mpanourgias@hotmail.com

Shawn Baier MTI, TEP

Mennonite Trust Ltd
116 La Ronge Rd
Saskatoon, SK S7K 8E5

Chapter: Saskatchewan
Tel: 306 933-2228
Fax:
Email: sbaier@mtrust.net

Chris Delaney LL.B., TEP

TD Wealth
380 Wellington Street, 17th Floor
London, ON N6A 5B5

Branch: London & South Western Ontario
Tel: 226-919-6126
Fax:
Email: chris.delaney@td.com

Salvatore Amelio LLB, TEP

MLT Aikins LLP
2200-10235-101St
Edmonton, AB T5J 3G1

Branch: Edmonton
Tel: 780-969-5089
Fax: 780-424-5864
Email: samelio@mltaikins.com

Darlene Walker MTI, TEP

RBC Wealth Management –
Estate & Trust Services
1871 Hollis Street
Halifax, NS B3J 0C3

Branch: Atlantic
Tel: 902-420-3233
Fax: 902-420-8343
Email: darlene.walker@rbc.com

Paul Taylor LLB, TEP
Borden Ladner Gervais LLP
World Exchange Plaza
100 Queen St, Suite 1100
Ottawa, ON K1P 1J9

Branch: Ottawa
Tel: 613-369-4769
Fax: 613-230-8842
Email: ptaylor@blg.com

Janis Armstrong
Director of Business Development
STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext. 228
Fax: 416-491-9499
Email: jarmstrong@step.ca

Nominations and Human Resources Committee

Chair

Rachel Blumenfeld BA, MA, LLB, TEP

Aird & Berlis LLP

Brookfield Place, 181 Bay Street

Suite 1800, Box 754

Toronto, ON

M5J 2T9

Branch:

Toronto

Tel:

416.865.3413

Fax:

416-863-1515

Email:

rblumenfeld@airdberlis.com

Tim Grieve BA, LLB, TEP

Merovitz Potechin LLP

1565 Carling Avenue, Suite 300

Ottawa, ON

K1Z 8R1

Branch:

Ottawa

Tel:

613-563-7544

Fax:

613-563-4577

Email:

tim@mpottawa.com

Laurie Lord TEP

TD Waterhouse Private Trust

45 O'Connor Street, 11th floor

Ottawa, ON

K1P 1A4

Branch:

Ottawa

Tel:

613-782-1212

Fax:

613-782-1261

Email:

lord.laurie@td.com

Ruth March CA, TEP

KPMG LLP

Purdy's Wharf Tower

Halifax, NS

B3J 3N2

Branch:

Atlantic

Tel:

902-492-6044

Fax:

902-492-1307

Email:

rmarch@kpmg.ca

Richard Niedermayer LLB, TEP

Stewart McKelvey LLP

1959 Upper Water Street, Suite 900

Halifax, NS

B3J 2X2

Branch:

Atlantic

Tel:

902-420-3339

Fax:

902-420-1417

Email:

rniedermayer@stewartmckelvey.com

Michael Dodick

Chief Operating Officer, STEP Canada

45 Sheppard Ave E, Suite 510

Toronto, ON

M2N 5W9

(ex officio)

Tel:

416-491-4949 ext. 223

Fax:

416-491-9499

Email:

mdodick@step.ca

Past Chairs

1998-2004

Michael Cadesky FCA, FTIHK, TEP

Cadesky Tax
2225 Sheppard Ave E. Ste. 1001
Toronto, ON M2J 5C2

Tel: 416-498-9500
Fax: 416-498-9501
Email: mcadesky@cadesky.com

2004-2007

Paul LeBreux LLB, LLM, TEP

Globacor Tax Advisors
Professional Corporation
37A Vanstone Drive
Ottawa, ON K2L 1W4

Tel: 416-844-7545
Email: paul@globacor.com

2007-2009

Grace Chow CA, FCCA, FCA, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Tel: 416-498-9500
Fax: 416-498-9501
Email: gchow@cadesky.com

2009-2011

Kim Moody FCA, TEP

Moodys Gartner Tax Law LLP
2910, 715-5 Avenue S.W.
Calgary, AB T2P 2X6

Tel: 403-693-5102
Fax: 403-693-5101
Email: kmoody@moodysgartner.com

2011-2013

Mary Anne Bueschkens MBA, LLB, TEP

Miller Thomson LLP
Scotia Plaza
40 King Street West, Suite 5800
Toronto, ON M5H 3S1

Tel: 416-595-7938
Fax: 416-595-8695
Email: mabueschkens@millertomson.com

2013-2015

Ian Worland LLB, TEP

Legacy Tax & Trust Lawyers
1300-777 Dunsmuir Street
PO Box 10444
Vancouver, BC V7Y 1K2

Tel: 604-631-1298
Fax: 604-683-6953
Email: iworland@legacylawyers.ca

2015-2017

Tim Grieve BA, LLB, TEP

Merovitz Potechin LLP
1565 Carling Avenue, Suite 300
Ottawa, ON K1Z 8R1

Tel: 613-563-7544
Fax: 613-563-4577
Email: tim@mpottawa.com

Special Continuing Professional Development (CPD) Committee

Michael Cadesky FCA, FTIHK, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-498-9500
Fax: 416-498-9501
Email: mcadesky@cadesky.com

Grace Chow CA, FCCA, FCA, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-498-9500
Fax: 416-498-9501
Email: gchow@cadesky.com

Paul LeBreux LLB, LLM, TEP

Globacor Tax Advisors
372 Bay St, 2nd Floor
Toronto, ON M5H 2W9

Branch: Toronto
Tel: 416-844-7545
Email: paul@globacor.com

Melanie McDonald LLB, TEP

BMO Trust Company
7th Floor, 350 7th Ave SW
Calgary, AB T2P 3N9

Branch: Calgary
Tel: 403-503-6257
Fax: 403-503-7377
Email: melanie.mcdonald@bmo.com

Kim Moody FCA, TEP

Moodys Gartner Tax Law LLP
2910, 715-5 Avenue S.W.
Calgary, AB T2P 2X6

Branch: Calgary
Tel: 403-693-5102
Fax: 403-693-5101
Email: kmoody@moodysgartner.com

STEP Inside Committee

Chair

Shamin Panchbhaya, CA,CFP, TEP
Royal Bank of Canada
11th Floor, Royal Bank Plaza South,
200 Bay Street
Toronto, ON M5J 2J5

Branch: Toronto
Tel: 416-955-2549
Fax: 416-955-5642
Email: shamim.panchbhaya@rbc.com

Katy Basi, LLB, MBA, TEP
Katy Basi Barrister & Solicitor
668 Major Mackenzie Dr E, Ste. 1207
Richmond Hill, ON L4C 1J9

Branch: Toronto
Tel: 905-237-9299
Fax: 1-800-671-6434
Email: katy@katybasi.com

Bernadette Dietrich LLB, TEP
McCarthy Tetreault LLP
Suite 4700, Toronto Dominion Bank Tower
Toronto Dominion Bank Centre
Toronto, ON M5K 1E6

Branch: Toronto
Tel: 416-601-7618
Fax: 416-868-0673
Email: bdietrich@mccarthy.ca

Paul Festeryga LLM, TEP
Stewart McKelvey
1959 Upper Water St, Suite 900
PO Box 997
Halifax, NS M5E 1J4

Branch: Atlantic
Tel: 902-420-3302
Fax: 902-420-1417
Email: pfesteryga@smss.com

Elena Hoffstein LLB, TEP
Fasken Martineau
333 Bay Street, Suite 2400
Bay Adelaide Centre, Box 20
Toronto, ON M5H 2T6

Branch: Toronto
Tel: 416-865-4388
Fax: 416-608-6202
Email: ehoffstein@fasken.com

Joyce Lee BA (Hons), LLB, TEP
Deloitte & Touche LLP
2800-1055 Dunsmuir St
PO Box 49279
Vancouver, BC V7X 1P4

Branch: Vancouver
Tel: 604-640-3092
Fax: 604-899-8369
Email: joylee@deloitte.ca

Barbara Novak LLL, TEP
Sweibel Novak LLP
3449 Ave du Musée
Montreal, QC H3G 2C8

Branch: Montreal
Tel: 514-849-1188
Fax: 514-849-1176
Email: bnovak@sweibelnovak.com

Christine Van Cauwenberghe CFP, TEP
Investors Group
447 Portage Avenue
Winnipeg, MB R3C 3B6

Branch: Winnipeg
Tel: 204-956-8427
Fax: 204-943-0021
Email: c.vancauwenberghe@investorsgroup.com

Susannah Roth Hon. BA, LLB, TEP
O'Sullivan Estate Lawyers
TD Bank Tower, 3430-66 Wellington St. W
Toronto, ON M5K 1E7

Branch: Toronto
Tel: 416-363-3336
Fax: 416-363-9570
Email: sroth@osullivanlaw.com

Corina Weigl LLB, TEP
Fasken Martineau
2400-333 Bay St, Bay Adelaide Centre
Toronto, ON M5J 2V1

Branch: Toronto
Tel: 416-601-5998
Fax: 416-364-7813
Email: cweigl@fasken.com

Pam Prior, CPA, CA, TEP

KPMG LLP
777 Dunsmuir Street, Pacific Centre
Vancouver, BC V7Y 1K3

Branch: Vancouver
Tel: 604-527-3613
Fax: 604-527-3636
Email: pprior@kpmg.ca

Janis Armstrong

Director of Business Development
STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(ex officio)

Tel: 416-491-4949 ext. 228
Fax: 416-491-9499
Email: jarmstrong@step.ca

Strategic Planning Committee

Chair

Ruth March CA, TEP

KPMG LLP
Purdy's Wharf Tower
Halifax, NS B3J 3N2

Branch: Atlantic
Tel: 902-492-6044
Fax: 902-492-1307
Email: rmarch@kpmg.ca

Michael Cadesky FCA, FTIHK, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-498-9500
Fax: 416-498-9501
Email: mcadesky@cadesky.com

Nancy Golding QC, TEP

Borden Ladner Gervais LLP
Centennial Place, East Tower
1900, 520 - 3rd Avenue SW
Calgary, AB T2P 0R3

Branch: Calgary
Tel: 403-232-9485
Fax: 403-266-1395
Email: ngolding@blg.com

George Hodgson

STEP Worldwide
Artillery House (South) 11-19
Artillery Row,
London, UK SW1P 1RT

Tel: +44(0)20 3752 3700

Past Chair

Tim Grieve BA, LLB, TEP

Merovitz Potechin LLP
1565 Carling Avenue, Suite 300
Ottawa, ON K1Z 8R1

Branch: Ottawa
Tel: 613-563-7544
Fax: 613-563-4577
Email: tim@mpottawa.com

Student Liaison Committee

Chair

Kyle McDonell MTI, TEP

RBC Wealth Management - Estate & Trust Services
Suite 200, 90 Sparks Street
Ottawa, ON K1P 5B4

Branch: Ottawa
Tel: 613-239-3076
Fax: 613-239-3218
Email: kyle.mcdonell@rbc.com

Robbie Brown CPA, CA, TEP

BMO Wealth Management
Suite 1901, 1969 Upper Water Street
Purdy's Wharf Tower II
Halifax, NS B3J 3R7

Branch: Atlantic
Tel: 902 496 7812
Fax:
Email: robert.brown@bmonb.com

Struan Smith LLB (Diploma Route)

CIBC Wood Gundy
644 Main Street, Suite 114
Moncton, NB E1C 1E2

Branch: Atlantic
Tel: 506 862 5155
Fax: 506 857 1731
Email: struan.smith@cibc.ca

Jamie Heuser TEP

Dixon Mitchell Investment Counsel
Suite 2160, 440 2nd Avenue SW
Calgary, AB T2P 5E9

Branch: Calgary
Tel: 403-930-1914
Fax: 604-684-3104
Email: jamie@dixonmitchell.com

Lisa Kayaga LLB, LLM, TEP

RBC Wealth Management
Suite 700 335 - 8 Ave SW
Calgary, AB T2P 1C9

Branch: Calgary
Tel: 403-299-4553
Email: lisa.kayaga@rbc.com

Malcolm Fast FCPA, FCA, CFP, TEP

Beyond Numbers Professional
Accountants LLP
14016 - 78 Ave NW
Edmonton, AB T5R 3C1

Branch: Edmonton
Tel: 780 966 2812
Fax: 780 4474417
Email: mfast@beyondnumbers.ca

Tracy VanPuymbroeck CPA, CA

Bossy Nagy Group Professional Corporation
52 Rideout Street West
Tillsonburg, ON N4G 2E3

Branch: London & Southwestern Ontario
Tel: 519-842-4263
Fax: 519-842-5241
Email: tvanpuymbroeck@bng-cpa.ca

Dan Derhy LLB, DDN, TEP

Derhy Trusts & Estates
1100 Sherbrooke Ouest 2^{ème} étage
Montreal, QC H3A 1G7

Branch: Montreal
Tel: 514-281-6000 ext. 620
Fax: 514-935-8847
Email: dderhy@derhytrust.com

David Pelchat CA

PSB Boisjoli LLP
3333 Graham Blvd, Suite 400
Montreal, QC H3R 3L5

Branch: Montreal
Tel: 514-341-5511 - 284
Fax:
Email: dpelchat@psbboisjoli.ca

Melodie Lind LLB, TEP

Pushor Mitchell LLP
301-1665 Ellis Street
Kelowna, BC V1Y2B3

Branch: Okanagan
Tel: 250-869-1210
Fax: 250-762-6665
Email: lind@pushormitchell.com

Kimberley Holmes (CETA Route)

RBC Wealth Management
Estate & Trust Services
90 Sparks Street, 2nd Floor
Ottawa, ON K1P 5T6

Branch: Ottawa
Tel: 613-239-3818
Fax: 613-239-3218
Email: kimberly.holmes@rbc.com

Francois JM Asselin CFP (CETA Route)

CIBC Wealth Advisory Services
150 Elgin St, 21st Floor
Ottawa, ON K2P 1L4

Branch: Ottawa
Tel: 613-239-2900
Fax: 613-564-8646
Email: francois.asselin@live.ca

Dawn Bell, LLB

Concentra Trust/Concentra Financial
333 3rd Ave N
Saskatoon, ON S7K 2M2

Branch: Saskatchewan
Tel: 306-956-4960
Fax:
Email: dawn.bell@concentrafinancial.ca

Gillian Musk MTI, TEP

BMO Harris Private Banking
1 First Canadian Place, 41st fl.
Toronto, ON M5X 1A1

Branch: Toronto
Tel: 416-359-7567
Fax: 416-359-8515
Email: gillian.musk@bmo.com

Henry Shew CPA, CA, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-642-8262
Fax: 647-629-8389
Email: hshew@cadesky.com

Lisa Lue (Diploma Route)

Scotia Trust
PO Box 430
130 King Street West (20th Floor)
Toronto, ON M5X 1K1

Branch: Toronto
Tel: 416 933 1610
Fax: 416 933 2223
Email: lisa.lue@scotiawealth.com

Jennifer Campbell (CETA Route)

Fasken Martineau
333 Bay Street, Suite 2400 Bay
Adelaide Centre, Box 20
Calgary, AB T2P 5E9

Branch: Toronto
Tel: 416-865-4543
Fax: 416-364-7813
Email: jcampbell@fasken.com

Alysha To CIM, CFP, MTI, CHS, TEP

Canaccord Genuity Wealth Management
609 Granville Street, Suite 2200
Vancouver, BC V7Y 1H2

Branch: Vancouver
Tel: 604-643-7091
Fax: 604-643-7064
Email: alysha.to@canaccord.com

Bradley Pashby CFP, CLU (Diploma Route)

SunLife Financial
620-475 West Georgia St.
Vancouver, BC V6B 5K5

Branch: Vancouver
Tel: 604 682 5643
Fax: 778 329 0673
Email: bradley.pashby@sunlife.com

Harmanjit Mavi JD/MBA, TEP

MLT Aikins LLP
30th Floor, 360 Main Street
Winnipeg, MB R3C 4G1

Branch: Winnipeg
Tel: 204-957-4613
Fax: 204-957-4244
Email: hmavi@mltaikins.com

Michael Dodick (*ex officio*)
Chief Operating Officer, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9
(*ex officio*)

Tel: 416-491-4949 ext.223
Fax: 416-491-9499
Email: mdodick@step.ca

Janet Gerongco (*ex officio*)
Education Coordinator, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9

Tel: 416-491-4949 ext.229
Fax: 416-491-9499
Email: education@step.ca

Alison Morgan (*ex officio*)
Education Consultant-
French Initiatives, STEP Canada
45 Sheppard Ave E, Suite 510
Toronto, ON M2N 5W9

Tel: 416-491-4949 ext.233
Fax: 416-491-9499
Email: amorgan@step.ca

Tax Technical Committee

Co-Chair

David Stevens LLB, DDN, TEP
Gowling Lafleur Henderson LLP
Suite 1600, 1 First Canadian Place
100 King Street West
Toronto, ON M5X 1G5

Branch: Toronto
Tel: 416-862-3556
Fax: 416-862-7661
Email: david.stevens@gowlings.com

Co-Chair

Maureen Berry LLB, TEP
Goodmans LLP
333 Bay Street, Suite 3400
Toronto, ON M5H 2S7

Branch: Toronto
Tel: 416-597-4287
Fax: 416-979-1234
Email: mberry@goodmans.ca

Roy Berg JD, LLM (US Tax), TEP
Moody's Gartner Tax Law LLP
2910, 715 - 5 Avenue S.W.
Calgary, AB T2P 2X6

Branch: Calgary
Tel: 403-693-5120
Fax: 403-693-5101
Email: rberg@moodysgartner.com

Lori Bokenfohr LLM, TEP
L. Bokenfohr Professional Corp
200, 638-11 Ave SW
Calgary, AB T2R 0E2

Branch: Calgary
Tel: 403-410-3846
Email: lori@bokenfohrlaw.ca

Paule Gauthier CPA CA, LLM, TEP
RBC Wealth Management
1 Place Ville Marie, 4th Floor, North Wing
Montreal, QC H3C 3A9

Branch: Montreal
Tel: 514-878-5090
Fax: 514-878-7802
Email: paule.gauthier@rbc.com

Lisa Heddema LLB, TEP
Smetheram & Company
600 - 1090 West Georgia Street
Vancouver, BC V6E 3V7

Branch: Vancouver
Tel: 604-696-3196
Fax: 604-669-3092
Email: lheddema@smetheramlaw.com

Ian Lebane LLB, LLM, TEP
TD Wealth Management
66 Wellington St W, 2nd fl
Toronto, ON M5K 1A2

Branch: Toronto
Tel: 416-308-9852
Fax: 416-949-6610
Email: ian.lebane@td.com

Hugo Patenaude M Fisc, TEP
KPMG s.r.l./S.E.N.C.R.L.
Tour KPMG, Bureau 1500,
600, boul. De Maisonneuve Ouest
Montreal, QC H3A 0A3

Branch: Montreal
Tel: 514-840-2612
Fax: 514-397-7600
Email: hpatenaude@kpmg.ca

Corina Weigl LLB, TEP
Fasken Martineau
2400-333 Bay St, Bay Adelaide Centre
Toronto, ON M5J 2V1

Branch: Toronto
Tel: 416-601-5998
Fax: 416-364-7813
Email: cweigl@fasken.com

Teresa Gombita CPA, CA, TEP
Ernst & Young
222 Bay St. P.O Box 251
Toronto, ON M5K 1J7

Branch: Toronto
Tel: 416-943-3272
Fax: 416-943-2445
Email: Teresa.gombita@ca.ey.com

Pamela Cross LLB, TEP
Borden Ladner Gervais LLP
World Exchange Plaza
1300-100 Queen Street
Ottawa, ON K1P 1J9

Branch: Ottawa
Tel: 613-787-3559
Fax: 613-563-4577
Email: pcross@blg.com

Chris Ireland CA, TEP
PPI Advisory
4370 Still Creek Dr, Suite 210
Burnaby, BC V5C 0G5

Tel: 604-909-1367
Fax: 604-688-8924
Email: cireland@ppi.ca

Robin MacKnight TEP, LLM
Wilson Vukelich LLP
60 Columbia Way, Suite 710
Markham, ON L3R 0C9

Tel: 905-940-0516
Fax: 905-940-8785
Email: rmacknight@wvllp.ca

Trust & Estate Technical Committee

Chair

Timothy Matthews QC, LLB, BCL, TEP

Stewart McKelvey Stirling Scales
1959 Upper Water St, PO Box 997
Halifax, NS B3J 2X2

Branch: Atlantic
Tel: 902-420-3325
Fax: 902-420-1417
Email: tmatthews@stewartmckelvey.com

Beaty Beaubier QC, BComm, LLB, TEP

Stevenson Hood Thornton Beaubier LLP
500, 123-2nd Ave. S.
Saskatoon, SK S7K 7E6

Chapter: Saskatchewan
Tel: 306-244-0132
Fax: 306-653-1118
Email: bbeaubier@shtb-law.com

Thomas Grozinger LLB, TEP

Royal Trust Corporation of Canada
90 Sparks St, Suite 300
Ottawa, ON K1P 5B4

Branch: Ottawa
Tel: 613-239-3045
Fax: 613-239-3218
Email: thomas.grozinger@rbc.com

Fiona Hunter BA, LLB, LLM, TEP

Horne Coupar
3rd Floor, 612 View Street
Victoria, BC V8S 4H8

Branch: Vancouver
Tel: 250-388-6631
Fax: 250-388-5974
Email: fhunter@hc-law.com

Phil Renaud QC, BA, LLB, TEP

Duncan & Craig LLP
2800 Scotia Place, 10060 Jasper Ave
Edmonton, AB T5J 3V9

Branch : Edmonton
Tel: 780-441-4334
Fax : 780-969-6374
Email: pjrenaud@dcllp.com

Eleanor Wiebe TEP

Fillmore Riley LLP
1700 - 360 Main Street
Winnipeg, MB R3C 3Z3

Branch: Winnipeg
Tel: 204-957-8301
Fax: 204-954-0301
Email: kewiebe@fillmoreriley.com

Daniel Frajman BCL, LLB, TEP

Spiegel Sohmer Avocats Lawyers
1255 Peel St, Suite 1000
Montreal, QC H3B 2T9

Tel: 514-875-2100 ext. 251
Fax: 514-875-8237
Email: dfrajman@spiegelsohmer.com

Public Policy Committee

Co-Chair

Michael Cadesky FCA, FTIHK, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-498-9500
Fax: 416-498-9501
Email: mcadesky@cadesky.com

Co-Chair

Pamela Cross LLB, TEP

Borden Ladner Gervais LLP
World Exchange Plaza
1300-100 Queen Street
Ottawa, ON K1P 1J9

Branch: Ottawa
Tel: 613-787-3559
Fax: 613-563-4577
Email: pcross@blg.com

Grace Chow CA, FCCA, FCA, TEP

Cadesky Tax
2225 Sheppard Avenue East
Suite 1001, Atria III
Toronto, ON M2J 5C2

Branch: Toronto
Tel: 416-498-9500
Fax: 416-498-9501
Email: gchow@cadesky.com

Timothy Matthews QC, LLB, BCL, TEP

Stewart McKelvey Stirling Scales
1959 Upper Water St, PO Box 997
Halifax, NS B3J 2X2

Branch: Atlantic
Tel: 902-420-3325
Fax: 902-420-1417
Email: tmatthews@stewartmckelvey.com

David Stevens CPA, CA, TEP

Gowling WLG
1 First Canadian Place
100 King Street West, Suite 1600
Toronto, ON M5X 1G5

Branch: Toronto
Tel: 416-862-3556
Fax: 416-862-7661
Email: david.stevens@gowlingwlg.com

Laurie Lord TEP

TD Waterhouse Private Trust
45 O'Connor Street, 11th floor
Ottawa, ON K1P 1A4

Branch: Ottawa
Tel: 613-782-1212
Fax: 613-782-1261
Email: lord.laurie@td.com

Kim Moody FCA, TEP

Moodys Gartner Tax Law LLP
210, 2020 - 4 Street SW
Calgary, AB T2S 1W3

Branch: Calgary
Tel: 403-693-5102
Fax: 403-693-5101
Email: kmoody@moodysgartner.com

William Fowlis QC, FCA, TEP

Miller Thomson LLP
3000, 700 - 9 Avenue S.W.
Calgary, AB T2P 3V4

Branch: Calgary
Tel: 403-298-2413
Fax: 403-262-0007
Email: wfowlis@millerthomson.com

Catherine Ann Brown BA, JD, LLM, PhD

University of Calgary
2500 University Drive NW

Tel: 403 492-5291
Fax: 403)282-8325
Email: brownc@ucalgary.ca

Ruth March CA, TEP

KPMG LLP
Purdy's Wharf Tower
Halifax, NS B3J 3N2

Branch: Atlantic
Tel: 902-492-6044
Fax: 902-492-1307
Email: rmarch@kpmg.ca