

Certificate in Estate and Trust Administration (CETA) Frequently Asked Questions



Are there any prerequisites for taking CETA?

Candidates who have successful post-secondary education and/or one-year wealth industry work experience are eligible to enroll in, CETA1: Foundations of Estate and Trust Administration. The subsequent CETA courses must be completed in order (2, 3 + exam) as each course acts as the prerequisite for the consecutive course. Only CETA1 is offered as a single course registration.

Who is a good candidate for CETA?

Whether you are interested in taking CETA1 as a single course or the full certificate program, both innovative offerings are designed to enhance the knowledge and performance of Canadian estate administrators, trust officers, junior trust officers, retail bankers, law clerks, junior associates, paralegals, wealth management sales representatives, and administrative assistants working in the area of estates and trusts.

Is there an in-class component?

All CETA courses, tutorials, and exams are delivered online through STEP Canada's electronic learning environment. There is no in-class component.

When can I register?

Course	Online registration available
CETA1: Foundations of estate and trust administration	Now
CETA2: Advanced topics in estate and trust administration	Now
CETA3: Estate and trust taxation	Now
CETA4: Certification Exam	March 6, 2017

To enroll, please follow this link: <http://www.step.ca/cetanotlogin.asp>

How long will it take to complete?

The course length for CETA1 varies depending on personal schedule and enrollment time. STEP recommends 60-80 hours of study time for this course and offers exam sittings at least twice a year in September and March. Most students will complete the course within a few months of enrolling but have up to one full calendar year. Students who enroll in the complete CETA Program can finish in as little as two years, but can take as long as four years to complete the full program.

Do you offer it in French? Quebec Civil Code?

At this time, the initial offering of the Certificate Program is offered in English, common-law. The Quebec Civil Code will be introduced for CETA1 and CETA2 in English later in 2016. Translation into French has been recommended for future offerings.

Are there any exemptions available for CETA?

Individuals who have completed the Estate and Trust Administration course through CSI are eligible for exemption from CETA1: Foundations of Estate and Trust Administration. The Estate and Trust Administration course must have been completed within 5 years of applying for the exemption. A fee of \$150 applies. To apply for this exemption, please contact education@step.ca.

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What are the registration cut-off dates?

Register by:	For course:	To write exam on:
February 22, 2016	CETA1, CETA2	May 30, 2016
June 13, 2016	CETA1, CETA2, CETA3, Certification Exam	September 19, 2016
November 28, 2016	CETA1, CETA2, CETA3, Certification Exam	March 6, 2017
June 18, 2017	CETA1, CETA2, CETA3, Certification Exam	September 18, 2017

What is the cost?

The CETA program consists of four components:

CETA1: Foundations of Estate and Trust Administration - \$795 CAD

CETA2: Advanced Topics in Estate and Trust Administration - \$595 CAD

CETA3: Estate and Trust Taxation - \$595 CAD

Certification Examination: \$295 CAD

CETA1 is available as a single course registration. Students enrolled in CETA2, 3, and the final exam must pay an annual STEP Canada affiliate membership fee of \$200 CAD/year on top of course costs. All prices are subject to applicable provincial or territorial taxes.

What are the CPD requirements for CETA students?

CETA students who hold an affiliate status (enrolled in CETA2, 3 + exam) must meet the CPD requirements as outlined by the STEP Worldwide policies found here: <http://www.step.org/steps-cpd-policy>. There are no CPD requirements to fulfill for CETA1.

Is CETA accredited by any institutions or societies?

The Institute for Advanced Financial Educations (IAFE) has accredited the CETA1 course for 30 CE credits.

Is there an annual fee for students?

There is no annual fee for students registered in CETA1: Foundations of Estate and Trust Administration. Students enrolled in CETA2, 3, and the certification examination are considered affiliate members of STEP Canada and must pay an annual membership fee of \$200/year while completing the certificate program. Certificate holders may choose to remain affiliate members of STEP once the certificate is achieved.

What are the exam dates?

Online exams are held twice a year: each May and November. Students do not need to report to an exam centre. The schedule for exams is:

EXAM DATES		
2016	May 30, 2016	September 19, 2016
2017	March 6, 2017	September 18, 2017

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What is the structure of the exam(s)?

CETA1: Foundations of Estate and Trust Administration

Exam format: two-hour, closed book, multiple choice, true/false, matching questions

CETA2: Advanced Topics in Estate and Trust Administration

Exam format: two-hour, open-book, multiple choice, true/false, matching, short-answer, case study questions

CETA3: Estate and Trust Taxation

Exam format: two-hour, open-book, multiple choice, true/false, matching, short-answer, case study questions

Certification Examination

Exam format: three-hour, open-book, case study questions ONLY

What is the pass rate for exams?

Students are required to achieve a minimum score of 60% in order to pass an exam.

Will I need to know the legislation for every province/territory?

Students will be asked to identify a jurisdiction (province or territory) that they are writing to. While students are expected to have a general knowledge of all legislation, they are only required to have in-depth knowledge of the jurisdiction that they choose to base their answers on. The questions will be designed in a way to allow for students to answer according to their jurisdiction.

What are the technical requirements for exam day?

You will be advised to test your computer's system requirements with those of the online proctoring system. Instructions on how to perform this test will be communicated to you through STEP Canada prior to exam day. A first attempt at this may take between 15-20 minutes to complete. It is the student's responsibility to do this test in advance of your online exam to ensure there are no surprises or unnecessary delays on exam day.

It is important that you:

- Perform the test on the computer that you are using on exam day
- Ensure that your machine has a working microphone *
- Ensure that your machine has a working webcam *
- Ensure that you have a reliable internet connection (i.e. hardwired or a dedicated, private Wi-Fi network)

**It is the student's responsibility to purchase this equipment if it is not already on their computer and ensure that the technology works. If you score poorly on the exam because you failed to perform the system test, ensure your equipment works, or follow proper protocols, STEP Canada will not grant you special considerations.*

At what time of day is the exam scheduled for, and is there a time limit to complete it?

On exam day, students must log-in to begin the exam anytime between 12:00 noon – 2:00 pm ET. Students have exactly two hours to complete the exam from the time they begin. A timer will appear

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on the screen once the exam has started. If a student exceeds more than two hours, the student will be asked to immediately submit the exam and answers submitted after this time will not be counted.

What are the exam proctor environment rules?

Your online exam will be invigilated remotely through an online proctor. There is no need to report to an exam centre.

Things to be aware of on exam day:

- Please dress appropriately as you will be proctored through your webcam
- The exam session will be recorded
- You will be asked to provide government-issued, photo identification
- The name that you sign in with must match your identification
- You will be asked to take a photo, neck-to-crown, for identification verification purposes
- You will be asked to perform a room scan with your webcam to verify that you are alone

What happens after I complete the course/program?

Students who successfully complete CETA1 will receive a STEP Canada document of course completion. Graduates of CETA1 are eligible to continue with the CETA Program to achieve the certificate. Students who complete the full CETA program will receive a certificate of completion from STEP Canada. Graduates of CETA have many options available to them. The CETA program provides the most current and comprehensive curriculum available and employers are looking for individuals with this level of knowledge. Certificate holders may choose to remain affiliates of STEP and receive full affiliate membership benefits, or continue on to pursue the TEP designation.

I'm interested in pursuing the TEP designation after CETA – is advanced standing available?

The full CETA program must be completed in order to achieve advanced standing while pursuing the TEP designation. Once the certificate is achieved, CETA program graduates have five years to enter into the STEP Canada Diploma program while maintaining their affiliate status. If these conditions are met, certificate holders will be granted an exemption from Diploma Program Course 3 (of 4), Wills, Trust and Estate Administration.

Does enrolling in CETA make me a member of STEP Canada?

Students enrolled in CETA1 are not considered members of STEP. If students continue on to CETA2, 3 and the final examination, they will attain affiliate status membership with STEP Canada. Students enrolled in CETA2, 3, and the certification examination are considered affiliates members of STEP Canada and must pay an annual membership fee of \$200/year while completing the certificate program. Certificate holders may remain affiliate members of STEP once the certificate is achieved, unless membership termination is requested. Please visit the STEP Canada website to read about the many benefits offered through membership.

Where do I access the STEP Canada electronic learning environment?

Once you have registered and paid, you will receive a separate email advising that you have been given access to STEP Canada's electronic learning environment. To access the e-classroom, please sign-in to the secure site of STEP Canada and follow the link from the CETA webpage.

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Are group study sessions or tutorial support available?

Group study sessions and tutorial support is available. Please email education@step.ca for more information.

What should I do if I forget my STEP Canada password?

If you have trouble accessing your STEP account, please contact the STEP Canada Education Coordinator for assistance.

Education Coordinator
Email: education@step.ca
Phone: 416-491-4949 x229

Will STEP Canada help me find a job?

While STEP Canada does not act as a placement agency, there is a Practitioner Opportunities section on our website, which lists available industry jobs that advertisers have posted to the site. Members and affiliates also receive the STEP Insider, a monthly eNewsletter which highlights the latest job advertisements. Please visit the STEP Canada website to view our latest practitioner opportunities.

Any other questions?

Please contact education@step.ca or call (416) 491-4949 x229.