

18TH NATIONAL CONFERENCE



JUNE 9-10, 2016

METRO TORONTO CONVENTION CENTRE

MEDIA ADVISORY/PHOTO OPPORTUNITY

For Immediate Release

Conference of Canada's Top Tax, Trust, and Estate-Planning Experts

Toronto, ON, June 6, 2016 – On June 9 and 10, the Society of Trust and Estate Practitioners of Canada (STEP Canada) will be holding its 18th Annual National Conference at the Metro Toronto Convention Centre. The 22,000 members of STEP Worldwide include professionals in the tax, accounting, legal, trust, and insurance industries, as well as wealth management and financial advisers. The conference will deliver superior technical information and business networking opportunities to the 700+ trust and estate practitioners registered.

“Year after year, the STEP national conference continues to be the ‘go to’ conference for experts in personal taxation, trust administration, accounting, insurance, and financial planning in Canada. Attendees will hear from over 65 international experts on topics that are relevant for today’s Canadian practitioners. This year’s conference will provide opportunities for STEP members to further their understanding in every facet of estate planning,” said Brian Cohen, co-chair of the 2016 National Conference Planning Committee.

“The STEP national conference provides the best opportunity for advisers to hear from Canadian and international experts in various areas related to estate planning and business succession planning. This year, the presentations will include updates on pending changes that will affect the insurance industry from 2017 onward, as well as proposed changes to the taxation of corporate income. Other sessions will focus on how gender differences may affect transfers of wealth and emerging issues in philanthropy,” added Christine Van Cauwenbergh, also co-chair of the planning committee.

What: [STEP Canada's 18th Annual National Conference](#)

Where: Metro Toronto Convention Centre, Level 700, South Building, 222 Bremner Blvd.

When: June 9-10, 2016

Who: Over 65 Canadian and international speakers and panelists discussing topics affecting Canadians

- Advising clients in times of unprecedented political, economic, cultural, and scientific change
- IRS compliance options
- Practitioner updates in tax, insurance, trust, and estate law
- Changes to section 55
- Rollovers, freezes, and conversions
- STEP Canada/CRA round table
- Estate planning for diverse communities
- New rules for trust and estates: 2016 is here and the future looks bright

Members of the media are encouraged to contact STEP Canada at 1-877-991-4949 x228 to be connected with local industry experts and potential story-support spokespeople. Media attendance is welcome at the conference on June 9-10. To arrange a media pass, please contact Janis Armstrong at 416-712-1170 or jarmstrong@step.ca.

About STEP Canada

STEP Canada is part of STEP Worldwide, the leading international organization for trust and estate professionals. The trust and estate practitioner (TEP) designation formally identifies qualified practitioners and distinguishes them from non-specialists who occasionally deal with trusts and estates. STEP subjects its members to rigorous training and requires them to meet strict educational standards on an ongoing basis. STEP's mandate is to provide a forum for discussion and to advance practitioners' knowledge of tax, accounting, administrative, statute, and case law through regular branch seminars, symposia, and an annual national conference. STEP Canada also makes representations of a technical nature to government, policymakers, and related professional bodies, with the goal of promoting better understanding of trusts and estates, and improving related law and policy. There are 20,100 TEPs worldwide and nearly 2,200 TEPs in Canada, operating not only as financial advisers but also as professionals in the accounting, trust, legal, and insurance industries.