



From strength to strength

STEP Canada is one of the country's most highly regarded professional private client associations. It has a thriving branch and education programme and its National Conference is a 'must attend' event for Canadian private client professionals. All of this success is down to dedicated volunteers, who sacrifice their time and energy for the organisation. Here, **Michael Cadesky** explains how STEP Canada started, and **Tim Grieve** discusses his vision for its future

The first time Michael Cadesky TEP heard about STEP was in March 1998, when he and Grace Chow TEP were asked to cross the Atlantic to address the trust and estate professionals based in two bailiwicks off the coast of France, more commonly known as Jersey and Guernsey.

'We were very impressed with the number of people that turned out to hear our talk on Canadian trusts and it sparked our curiosity about the organisation,' explains Michael.

Assisted by Geoffrey Shindler OBE TEP, Michael and Grace set out to increase STEP's prominence in Canada. Forgoing the grass-roots approach of establishing chapter then branch, they instead concentrated their efforts on forming a national structure, now known as 'STEP Canada', from which they grew the branch structure.

The initial years were tough, as they had no financial backing and very limited resources. 'Virtually no one in Canada had heard of STEP at that time; it was an uphill task to explain why STEP would be relevant and why people should become members,' Michael explains. But Michael and Grace persisted.

They focused on organising branch programmes and educational opportunities. Then they alighted on the idea of a national conference: 'Our first national conference was a one-day event, but we managed to make a small profit, partly through lead sponsorship from the Royal Bank of Canada,' Michael explains.

Membership grew rapidly at that point and settled at around 1,000 practitioners. Then, in 2001, the examination route was introduced, which proved to

be a great advantage. 'A flood of applications came through and membership doubled in only four months. We reached 2,000 members, with STEP Toronto becoming, at that time, the largest branch of STEP in the world,' says Michael.

WHAT MEMBERS WANT

Multi-faceted membership drives helped membership of STEP Canada grow. 'We targeted members at large with the "buddy" system, where members were encouraged to sign up a colleague, and we asked ➤➤

STEP CANADA STATISTICS

National secretariat: STEP Canada, www.step.ca

Structure: Eight branches and three chapters

Number of members: Over 2,200

Membership profile (estimated): Thirty-five per cent lawyers, 25 per cent accountants, 25 per cent financial planners, 10 per cent trust professionals, 5 per cent insurance advisors

Educational offering: Access to over 70 regional continuing education programmes per year

National conference: One a year

Regional course offering: STEP Diploma for Canada and STEP Certificate in Estate and Trust Administration (CETA)

Government engagement: Yes. The most recent submission to the Canadian government concerned corporate tax avoidance



larger firms to promote STEP membership within their organisations,' Michael explains.

Michael was acutely aware that the service offered to members had to be right: 'People are interested in education and networking, and that is where the focus should be.' His vision is shared by Tim Grieve TEP, STEP Canada's recently elected Chair: 'My task is to build on the success of STEP Canada by launching new initiatives to raise brand awareness, to enhance the member offer by increasing national programming and to oversee the implementation of our strategic plan,' Tim explains.

The new Chair will have his work cut out. 'We have to continually review, revise and enhance our member offer to remain relevant to members,' he says. But assistance is at hand: 'Being part of the strong, global STEP organisation helps, as we can draw on the best practices of STEP worldwide as members grapple with these questions and implement new ideas.'

Collaborative opportunities with other professional associations in the industry are actively sought out by STEP Canada as a way to develop the member offer, as Tim explains: 'We work hard to develop excellent relationships and co-marketing opportunities with these bodies.' Tim is also keen to increase brand awareness of STEP and the TEP designation, and to educate the Canadian public about what STEP does. There are also plans in the pipeline to increase the reach of education programmes – for example, by translating existing programmes into French for practitioners in Quebec.

STEP CANADA NATIONAL CONFERENCE

The success of STEP Canada is epitomised by its National Conference. Next year marks the conference's 18th iteration (it will take place on 9–10 June at the Metro Toronto Convention Centre, for those wishing to save the date). It is now one of the largest STEP conferences, with the 2015 conference attracting a record 650 delegates. It is also considered a 'must attend' event for Canadian TEPs: 'This conference is far and away the best tax conference I attend all year,' enthused one delegate recently.

The work involved in organising this two-day event is colossal, as Janis Armstrong, Director of Business Development at STEP Canada, explains: 'Dates are set two years out, the contract is signed 12 months out, conference planning begins ten months out, and the committee starts biweekly meetings nine months out and continues to meet bi-weekly until the final programme is realised, in mid-March.' The following year's conference date is announced at the current year's conference, and then the whole process starts again.

The conference's technical programme is one of the main draws for delegates. 'The technical content is fantastic. There is nowhere else to get the same quality of estate and trust technical content as that which STEP offers every year,' said another satisfied attendee.

The high-quality content is the result of a dedicated programme committee and expert speakers. 'The committee holds meetings to determine what topics should be covered and to ensure sessions are timely and relevant. Luckily, our members continue to send us ideas, which allows the committee to stay attuned to what the membership wants,' explains Tim.

Volunteers' involvement in the conference is crucial and their dedication is greatly appreciated: 'The amazing volunteers who make up the programme committee have the vision to produce technical sessions that appeal to so many of our members. The conference speakers then spend hours preparing their presentations and papers,' says Janis.

Maintaining the technical content at a consistently excellent level year after year has boosted the conference's success and reputation. 'But equally as important,' says Tim, 'is to draw together a conference-planning team that includes respected members of the constituent professional organisations; to ensure representation from regions, especially where there are regional differences; and to embrace the hard work that goes into planning and executing a successful conference.'

The format of the conference has remained the same for the past seven years. But the committee is always reviewing the structure to identify what, if anything, can be improved. 'Every year, we have a meeting immediately after the conference and ask ourselves what went well, what didn't go well, and what can we do better next time,' explains Janis. For example, in 2014, the STEP Canada Conference App was introduced, and an overflow space was organised for the plenary session via video and audio feeds to accommodate attendees.

HARD WORK PAYS OFF

Thanks to Grace, Michael and numerous dedicated volunteers, STEP Canada has become a vital part of the professional landscape in the country. 'Provided we have the continuing support of volunteers and the membership in general, I think there is every reason to believe STEP Canada will continue to expand in terms of membership, activities and programmes,' comments Michael.

Michael feels that STEP Canada has grown beyond what he and Grace thought it would ever become in the early days, even though they were optimistic, ambitious and had high expectations: 'When I look at the work that is being done by volunteers, and their enthusiasm, on the STEP Canada board, various committees and branch committees, as well as the work of the STEP Canada office, I am overwhelmed.'



MICHAEL CADESKY
TEP IS MANAGING PARTNER AT CADESKY TAX, AND A VICE-PRESIDENT OF STEP. **TIM GRIEVE**
TEP IS PARTNER AT MEROVITZ POTECHIN LLP, AND CHAIR OF STEP CANADA

GET INVOLVED

Volunteer support is crucial to STEP, but it also offers real benefits to those who get involved, such as improving your skill set, boosting your career, offering a say in STEP's strategic direction, and influencing policy. There are so many ways to get involved – at a local, national or international level. From joining your local branch committee to taking part in regional or international working groups and committees, there are opportunities for everyone. The best way to get involved is to speak to your local branch chair (see www.step.org/branches-chapters) or contact the STEP office (visit www.step.org/contact).

More information, including interviews with branch committee, STEP Council and STEP Board members, is available at www.step.org/get-involved