

Hi member! With access to our monthly **STEP Insider**, you receive the latest news about upcoming CPD and networking events, practitioner opportunities, education updates, and more!

Newsletter Vol. 14 | Issue 7 | July 14, 2026

Looking to see what events are taking place this month? Scroll down!



[NEW STEP Canada Website](#)

[STEP Worldwide Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

21st Annual STEP Private Client Awards

We are pleased to share that 374 submissions were received from 26 different countries, with 28 submissions coming from Canada - a 12% increase from 2025! Congratulations and good luck to our Canadian finalists:

Crysalia
- Family Business Advisory Practice of the Year

NIKA LAW LLP
- Boutique Firm of the Year (Legal)
- Contentious Trusts and Estates Team of the Year (Midsize Firm)

Our Family Office
- Boutique Firm of the Year (Non-Legal)

Shajani
- Boutique Firm of the Year (Non-Legal)

TD Wealth Family Office
- Investment Team of the Year
- Multi-Family Office Team of the Year

STEP Private Client Awards

FINALISTS ANNOUNCED

[Learn More About the Private Client Awards](#)

New STEP Vancouver Island Chapter

We are thrilled to officially launch the brand-new STEP Vancouver Island Chapter!

The chapter will offer local networking opportunities, programming tailored to regional interests, and engagements for students pursuing STEP education. It will enhance members' ability to share specialist knowledge, build professional networks, and create increased opportunities for regional representation.

The inaugural membership base of 80 members has now been created, and we look forward to celebrating this new chapter at a Special Launch Event in September!



[Learn More About the STEP Vancouver Island Chapter](#)

2026-27 Renewal Campaign Complete

Thank you to the over **93%** of STEP Canada members that renewed their membership and confirmed their commitments for 2026-27!

Members in good standing receive numerous exclusive benefits, including use of the TEP designation and STEP logo (Full Members), discounts on programs and seminars, access to member-only publications and resources, use of the Searchable Resource Tool (SRT), advocacy and representation from STEP, and much more.

If you have any questions regarding your membership please email memberservices@step.ca.



STEP Canada's 28th National Conference

Building Connections, Sharing Knowledge
Online On-Demand Available Until December 31

Looking for a convenient and easy way to earn your CPD? Look no further! Register today to have on-demand access to all 19 conference sessions, so you can watch when it works best for you. Experience this year's exceptional program that will unpack current developments, emerging trends, and practical strategies shaping the trust and estate landscape.

"Excellent content and a great way to stay up to date on an annual basis."



Register for Online On-Demand Access

New Blog Post:

"The STEP Canada National conference has long been the premier gathering for trust and estate professionals across the country. Now in its 28th year, the conference continues to grow in both scale and impact, bringing together lawyers, accountants, trust officers, financial planners, and other advisors committed to excellence in serving Canadian families and clients."



Continue Reading the Blog Post

STEP Global Congress 2026

November 24 + 25, 2026
Hamilton Princess Hotel & Beach Club, Bermuda

A must-attend conference in the diaries of leading practitioners around the world, Global Congress brings together experts to collaborate, innovate, and learn. This year's theme, *Mind, Law, and Machine - Navigating Trusts, Estates, and Capacity in a Digital Age*, will discuss the big issues facing our profession, both now and in the future.

Discover fresh ideas, engage in expert-led presentations, and connect with leading advisors, experts, and speakers. In 2025, over 340 delegates attended from across 50 countries.

Registration is open to members and non-members. Save with the early bird discount by registering before September 4th! Registered delegates will also save 15% on flights with the official airline partner, BermudAir.



Learn More About the 2026 Global Congress

Events

Reminder: 2025-26 Branch Bundle registrants will have access to online on-demand replays (where applicable) until December 31, 2026.

Get Ready for an Exciting 2026-27 Program Season

Your branch/chapter boards are excited to share a sneak peak of what's ahead for the upcoming program season! From unique social events to in-depth technical seminars, TEP Talks to student study sessions, and a brand new Full-Day Course (coming Winter 2027), there is an incredible line up in store for you.

Check out our [Event Calendar](#) to see the already-confirmed upcoming events for the next program season - and more will soon be added.

Stay tuned for full event information and registration to launch in August!



Looking for Accredited CPD? We've Got You Covered

Local and National STEP Canada events are designed to meet the continuing education requirements for provincial law societies, governing bodies, and professional associations by offering unique and timely technical content. Members can also fulfill their STEP CPD requirements by attending seminars that align with their reflective development goals.

STEP Canada applies for accreditation, where required, for all relevant paid technical seminars to support its membership and their professional outcomes. [Visit the FAQ section](#) on our website to learn more about CPD accreditation for STEP Canada's events.



If you have questions relating to your CPD certificates or would like more information, please email memberservices@step.ca.

Refreshed Marketing Brochures for Clients

As part of a new national campaign, STEP Canada is aiming to help Canadians identify and understand the TEP designation so they can make informed decisions with confidence.

These marketing brochures, updated in 2025, are designed for you to display in your office or provide to your clients in order to make complicated matters easier for them to understand. They are available only to members of STEP Canada, and all members were sent a sample of each brochure with their physical member renewal kit.

For the cost of printing, only \$5 CAD for a pack of 10 brochures (+ tax and shipping), these brochures provide excellent value for promoting your specialized skillset and supporting clients.



[Learn More About Our Brochures](#)

Practitioner Opportunities

Advertising with STEP Canada's Practitioner Opportunities service offers a highly **cost-effective**, **quick**, and **simple way** to attract the right candidates in this industry - a great resource for connecting the highest caliber of trust and estate practitioners to employers.

Available positions:

[Senior Financial Planner, Wealth Management - BDO Canada LLP \(London, ON\)](#)

[Wealth Advisor - BDO Canada LLP \(Calgary, AB\)](#)

[Vice President, Professional Services - PPI Management Inc. \(Quebec, QC\)](#)

[Executive Trust Officer - TD Wealth Private Trust \(Ottawa, ON\)](#)

[Tax Accountant - IG Wealth Management Inc. \(Canada excluding Quebec\)](#)



[Learn More](#)

Outreach & Development: Find Us in Your Community

On July 7th and 8th, Andreea Norocel, TEP, and Beatriz Davilla, TEP, Student Liaison Officers for STEP Montreal, delivered three STEP information sessions to 75 students studying in the Masters Degree program at Sherbrooke University, both at the Sherbrooke Campus and Longueuil Campus.

Through our presence at university sessions, we are working to strengthen the profession, attract new talent, and represent our members across Canada's professional landscape.

If you have questions or would like more information on our University Lunch & Learn sessions as part of our outreach and development initiatives, please email education@step.ca.



[Learn More](#)

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1-4	All CETA exams are available online on-demand. Must be completed within 12 months of registration.	Registration open on a rolling basis for on-demand exams
NEW: Investment Basics for Fiduciaries (IB) 1-4	Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment.	Registration is open on a rolling basis.
STEP Canada Diploma Program (All Courses)	November 2-3, 2026	September 1, 2026
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course)	November 2-3, 2026	September 1, 2026
Essay Submission	October 1, 2026	<u>2026 topics can be found here</u>

Education Program Updates

Results from the May exam are now posted on your MY STEP account under “My Courses & Marks”. Registration for the Fall 2026 term (exam date: November 2-3, 2026) is open. Select “Diploma Program Registration” to enroll.

Reminder: The deadline to register for the November exam is September 1, 2026.

Completed the program? Don't forget to submit your Full Membership Upgrade application to education@step.ca to apply for your TEP designation.

Diploma program completion certificates will be mailed late August to your preferred mailing address on file.

Single Course Registration for Taxation of Trusts & Estates

Full members can now access the second course in the STEP Canada Diploma Program, Taxation of Trusts and Estates. [Login to your MY STEP account](#) to register for this course. This comprehensive course offers you the opportunity to prepare with tax basics or start directly with the trust and estate tax topics. A live virtual case study series and instructor resources are available. If you have questions, reach out to education@step.ca.

NEW Certificate Program: Investment Basics for Fiduciaries (IB)

Designed for trust and estate professionals, this program provides essential investment knowledge for those that administer estates, trusts, and manage the financial affairs of incapable persons. By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance. Registration is on a course-by-course basis. [Read our brochure to learn more.](#)

Connect With Us on LinkedIn

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.



Follow STEP Canada

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).

Reminders

STEP Canada staff work remotely and members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to memberservices@step.ca and our team will forward your message to the right staff member.

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, ON M2N 5W9 - Canada
Telephone: 416-491-4949