*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 11 | November 10, 2026

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

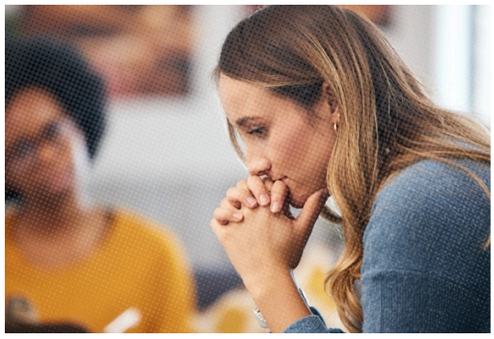
STEP CANADA
Supporting trust and estate practitioners in their pursuit of excellence

insider

STEP Canada Website | STEP Worldwide Member Directory

STEP Worldwide Website | Practitioner Opportunities

Registration Now Open: 2027 Full-Day Course



STEP Canada is pleased to announce that the 2027 Full Day course, **Taxation at Death and Post Mortem Planning**, authored and presented by **Chris Ireland, TEP**, and **Kenneth Keung, TEP,** is now open for registration.

The course will begin it's cross-country tour in January 2027, making 12 stops for each of our branches and chapters.

All courses are offered in-person only with a limited capacity in each region. Courses will not be recorded or available online. We encourage you to register early to secure your spot!

Learn More and Save Your Spot

We Want Your Questions



The 2027 CRA / STEP Roundtable Committee invites you to submit questions to be considered for the 2027 Roundtable presentation that will take place during the 29th National Conference in June 2027. Each year, the much anticipated session proves to be a highlight of the conference; and an invaluable resource to estate planning practitioners across the country. Your contribution to the "question bank" will be appreciated by the committee; and if selected, by thousands of practitioners.

Questions must be received by MONDAY, NOVEMBER 30 for consideration.

Submit Your Questions For Consideration

Save the Date: 2027 STEP Atlantic Regional Conference



Mark your calendar to join us in Halifax for a unique STEP Atlantic Regional Conference - bringing together trust and estate professionals from across the region!

🗓️ Monday, September 20, 2027
📍 Halifax Marriott Harbourfront Hotel, Halifax, NS
👥 Includes technical sessions, breakfast, lunch, health breaks, exhibits, and networking opportunities
🎓 Up to 6.75 hours of CPD
🍸 Optional ticketed cocktail event on Sunday evening

Registration and sponsorship opportunities will launch in the spring of 2027.

The planning committee is accepting session proposals for consideration up until **December 1, 2026.** Please note that the audience will be multidisciplinary with varying levels of expertise, and proposals should include a session topic/title, brief description, learning outcomes, and technical level. To be considered by the committee, please send in your session proposal to Janis Armstrong at **jarmstrong@step.ca**.

Submit Your Session Proposals for Consideration

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 years' 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. Registered delegates will save 15% on flights with the official airline partner, BermudAir.



Learn More About the 2026 Global Congress

Participate in an Exciting 2026-27 Program Season

Learn. Connect. Grow.

Don't miss out! 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 for the 2026-27 program season.

Explore your local offerings and get in on the excitement by registering early! More information on upcoming events can be found below.

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



Explore Upcoming Events in Your Area

Upcoming Events Across the Country

Registration Now Open

STEP Southwestern Ontario
November 12, 2026
12:00pm - 1:00pm ET
Member's Only

Online TEP Talk

STEP Toronto
November 12, 2026
5:30pm - 8:30pm ET
Student Event

Wheel of Fortune Trivia Night

STEP Vancouver
November 13, 2026
5:30pm - 8:30pm PCT
Student Networking Event

STEP Into the Lanes - An Evening of Bowling

STEP Calgary
November 18, 2026
11:30am - 2:00pm ABT
Bundle Seminar

Considerations When Dealing with Non-Resident Representatives, Beneficiaries and Assets

STEP Edmonton
November 18, 2026
4:00pm - 6:00pm ABT
Student Event

Student Networking Event

STEP Montreal
November 19, 2026
12:00pm - 2:00pm ET
Study Session

Pot-pourri de sujets/ Bring Your Own Subject

STEP Atlantic
November 19, 2026

STEP Vancouver
November 19, 2026

STEP Okanagan
November 24, 2026

2:30pm - 4:30pm AT
Bundle Seminar

[Local Finance Roundtable with Kenneth Keung and Bryan Whalen]

7:30am - 9:30am PCT
Bundle Seminar

[Where There's No Will, There's Still a Way: Dealing with a B.C. Resident Intestacy]

3:00pm - 5:00pm PCT
Bundle Seminar

[Trusts vs. Modern Alternatives for Protecting Wealth & Family]

STEP Winnipeg
November 24, 2026
11:30am - 1:30pm MBT
Bundle Seminar

[Keeping the Peace (and the CRA Happy): Spousal Trusts in Action]

STEP Toronto
November 25, 2026
4:00pm - 5:30pm ET
Bundle Seminar

[Trust Us It Will Be Topical I: Taxing Times]

STEP Ottawa
November 25, 2026
5:00pm - 7:00pm ET
Student Event

[Student Social Event]

STEP Toronto
November 30, 2026
11:45am - 1:00pm ET
Member's Only

[STEPping out to Lunch]

STEP Ottawa
December 2, 2026
4:00pm - 7:00pm ET
Social Event

[Holiday Jingle & Mingle]

STEP Winnipeg
December 2, 2026
12:00pm - 1:00pm MBT
Member's Only

[Online TEP Talk]

STEP Starts Here - Getting Involved

In this section, volunteers from across the country will share how they took the first STEP to get involved - and where it has led them.



Lisa Kayaga, TEP
BMO Wealth Management
STEP Calgary

"I was introduced to STEP Canada by a senior partner early in my career, and as an Internationally trained lawyer STEP opened doors I had not known existed in Canada. Through STEP, I discovered career opportunities in the trust industry, deepened my estate planning knowledge, and built relationships with professionals who generously shared their experience. More than a professional network, STEP gave me a community.

When I moved from Ottawa to Calgary, STEP Canada connected me with members of the Calgary Branch who helped me establish my practice and build meaningful professional and personal relationships. Joining the Calgary Branch board allowed me to give back while developing skills outside my role at the bank. One of my most rewarding experiences on the board was serving as student liaison and supporting students through their STEP Diploma journey.

Completing the STEP Diploma was a game changer. It strengthened my confidence and broadened my knowledge of taxation, insurance, trusts, and cross border planning. I encourage members to take full advantage of what STEP has to offer, whether through the different pathways to becoming a TEP, local branch events offered in person or online, committees, or board service. If you are not sure where to start, reach out to your local branch / chapter and have a coffee with a board member. Getting involved with STEP is an investment in your career. The more you put into it, the greater the return, both professionally and personally."

Lisa is currently the STEP Calgary Program Officer, and has previously held the roles of Student Liaison Officer, Education Officer, Member Services Officer, and Member at Large. Through these roles, she was an active participant of the national STEP Canada Member Services Committee, Student Liaison Committee, and Education Committee.

There are many ways to deepen your involvement with STEP while building your expertise and expanding your network. Attend a technical seminar, connect at a networking event, contribute your knowledge as a speaker, or make an impact by volunteering on a committee.

For more information on how to engage with STEP, reach out to your local Member Services Officer.

Are you interested in sharing your volunteer journey with STEP members and encouraging others to become involved? Send us an email with your story to memberservices@step.ca.

Learn More About Volunteering With STEP Canada

Save the Date - 29th National Conference

Mark the date in your calendar!

Planning is well underway for STEP Canada's 29th National Conference, and we hope to see you in June 2027 taking advantage of the great technical sessions and networking opportunities!

Monday, June 7 & Tuesday, June 8, 2027
at the Sheraton Centre Toronto Hotel

Monday, June 14, 2027
On-Demand Replays

Watch your email and step.ca for details and registration to be released in January.



New for 2027: As a benefit of membership, STEP Canada members will have the exclusive opportunity to register for the conference during the first two weeks that registration is available.

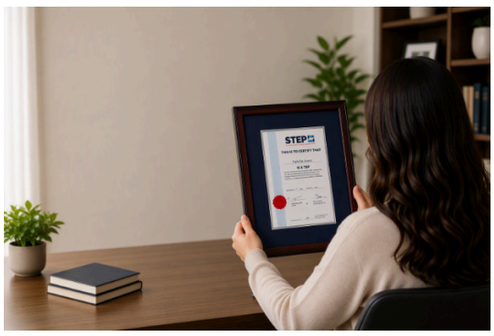
Now Available - STEP Branded TEP Certificate Frames

You asked, and we listened!

We are excited to announce that STEP Canada-branded TEP certificate frames are now available for purchase. Available in three beautiful and distinct patterns, with a silver-embossed STEP logo foil, these frames will proudly showcase your TEP certificate.

Full members can find the link to purchase their frame through their MY STEP profile.

These frames are being sold at wholesale prices directly from the supplier to full members.



View the STEP Canada-Branded TEP Certificate Frames

Family Enterprise Advisory Program

Provided by Family Enterprise Canada

Only the FEA Program equips you to navigate the unique complexities inherent in advising entrepreneurial families and families of wealth. As the global benchmark in family enterprise advising, earning the FEA designation helps you stand out in this increasingly crowded field.

The FEA program is now offered in 4 annual cohorts: three with a blend of in-person and virtual learning and 1 entirely virtual so you can earn the FEA designation from anywhere in the world. Register now to take advantage of early bird pricing, plus a 10% discount for STEP Members!



"The FEA program strengthened my understanding of families and equipped me with practical tools to build relationships, facilitate meaningful conversations, and support families in planning for future success. I encourage everyone to take the program and discover how they can make a lasting difference in the lives of the families they serve."

- Tannis Dawson, CPA, CA, CFP, TEP, FEA, CLU, RRC, TD Wealth: Winnipeg

Learn More About the FEA Program

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.

Current Opportunities:

Senior Trust Officer - Solus Trust Company (Vancouver/Victoria, BC)

Trust Officer - Solus Trust Company (Vancouver/Victoria, BC)



Learn More

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 it's 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**.

STEP Canada's 28th National Conference

Building Connections, Sharing Knowledge
Online On-Demand Available Until December 31, 2026

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

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)*	May 31 - June 1, 2027	March 1, 2027
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates *(Standalone course)*	May 31 - June 1, 2027	March 1, 2027
Essay Submission	May 1, 2027	**2027 topics can be found here**

Updates

DIPLOMA PROGRAM
Diploma exam grades for the November 2-3 sitting will be released on December 4. Students will receive an email notification once grades are available on their MY STEP account under “My Courses & Marks.”

Students wishing to register for their next course before receiving their grade may complete a provisional registration. The provisional registration form and additional details are available on the course platform under the Exam section.

For students who have successfully completed their program, congratulations on this achievement. Certificates will be mailed out in February 2027. Please ensure your preferred mailing address is updated on your profile no later than December 15.

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.

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