*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 10 | October 13, 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

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

21st Annual STEP Private Client Awards - Canadian Winners

We are delighted to congratulate two Canadian firms on their well-deserved wins at the 21st STEP Private Client Awards!

Our Family Office Inc. won for the Boutique Firm of the Year (non-legal), and **TD Wealth** Family Office won for Multi-Family Office Team of the Year.

Seen as the hallmark of quality within the private client industry, these prestigious awards recognize and celebrate excellence. We are proud to see a continued Canadian presence being showcased on the global stage, and extend our congratulations to all of this years winners and our other Canadian finalists: Crysalia, NIKA LAW LLP, and Shajani CPA.





Our Family Office
Boutique Firm of the Year (non-legal firm)

Tim Cestnick TEP and Henry Shew TEP

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

Anna Dayan, Syed Naqvi, Elise Pulver TEP, Ryan McNally, and Emma Lovell (Presenter)

Learn More About the 2026 Winners

October 2026 Edition of STEP Inside

Jump into the newly released October 2026 edition of STEP Inside, highlighting our 28th National Conference. Members can find their digital copy after logging into their MY STEP accounts.

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget! As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource in addition to the electronic copy. Review and update your subscription preferences in your MY STEP account.



Login to Your MY STEP Account

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

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

Submit Your National Conference Session Proposals

Now is your chance to contribute to the 2027 STEP Canada National Conference Program!

The National Conference Program Committee welcomes proposals for conference sessions from all members. To be considered by the committee, please send in your session proposal to Janis Armstrong at jarmstrong@step.ca by **SATURDAY, OCTOBER 31.**

The 29th National Conference will take place on Monday and Tuesday, June 7 and 8, 2027 in Toronto.



Submit Your Session Proposals for Consideration

Get Ready for 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

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

Coming Soon: 2027 Full-Day Course

STEP Canada is pleased to announce an upcoming Full Day course, **Taxation at Death and Post Mortem Planning**, authored and presented by **Chris Ireland, TEP**, and **Kenneth Keung, TEP**.

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

All courses will be offered in-person only with a limited capacity in each region. Courses will not be recorded or available online. We encourage you to save the date for your region and watch your email for details and registration!



Save the Date for Your Region

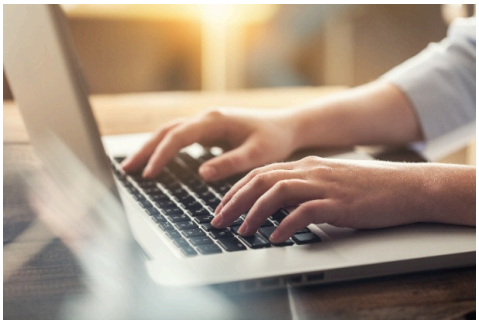
2026 STEP CPD Audit Deadline Approaching

On **August 25, 2026**, STEP began the annual CPD Audit and 2.5% of STEP members globally were randomly selected to have their CPD records audited.

Those selected will need to complete the online CPD record form and will have two months to submit. Members were notified by email, and will receive reminder emails throughout the two month period.

The deadline for CPD Audit submissions is **October 26, 2026**.

If you have any questions or concerns please reach out to the CPD team at **CPD@step.org**.



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

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**.

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 Estate Administrator - Amin Law Professional Corporation (London, ON)]

[Senior Manager, Tax, Product & Planning - Scotiatrust (Anywhere in Canada)]



Learn More

Upcoming Events Across the Country

Registration Now Open

STEP Winnipeg
October 13, 2026
11:30am - 1:30pm CT
Bundle Seminar

["Just a Simple Gift" … Or is it? Navigating Traps in Family Gifting]

STEP Montreal
October 22, 2026
12:00pm - 2:00pm ET
Study Session

[Tax Nasties – Cautionary Tales About Life Insurance]

STEP Toronto
October 26, 2026
11:45am - 1:00pm ET
Members Only

[STEPping out to Lunch - In-Person]

STEP Winnipeg
October 28, 2026
12:00pm - 1:00pm CT
Members Only

[TEP Talk]

STEP Southwestern Ontario
October 28, 2026
8:30am - 12:00pm ET
Bundle Half-Day Event

[Estate Planning That Survives Scrutiny]

STEP Calgary
October 28, 2026
12:00pm - 1:00pm MT
Members Only

[Hybrid TEP Talk]

STEP Toronto
October 28, 2026
4:00pm - 5:30pm ET
Bundle Seminar

[Mind the Gap: Navigating Professional Grey Areas]

STEP Edmonton
November 4, 2026
11:45am - 1:30pm MT
Bundle Seminar

[Fertility Law and Estate Planning]

STEP Vancouver Island
November 5, 2026
3:00pm - 5:00pm PT
Bundle Seminar

[Medical Assistance in Dying (MAiD): Legal, Tax, and Estate Planning Considerations for Trust & Estate Professionals]

Save the Date - Registration Opening Soon

STEP Saskatchewan
November 4, 2026
3:00pm - 5:00pm CST
Bundle Seminar

Charitable Giving Strategies for Private Corporation

STEP Calgary
November 5, 2026
4:30pm - 6:30pm MT
Study Session

Fireside Chat & Student Networking Event

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

Wheel of Fortune Trivia Night

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 May 31 - June 1, 2027	Registration closed March 1, 2027
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates *(Standalone course)*	November 2 - 3, 2026 May 31 - June 1, 2027	Registration closed March 1, 2027
Essay Submission	May 1, 2027	**2026 topics can be found here**

Updates

DIPLOMA PROGRAM

Exam Preparation: Join your instructors for live-virtual tutorials, access the instructor Q&A board, and review preparation materials. Dates and details are posted in the course portals.

TEP UPGRADE APPLICATIONS *Important information*

As of July 10th, there is an updated Full Member Upgrade Application form. If you have not submitted your application, please reach out to Education@step.ca to obtain the newest application form and procedures.

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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