

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 9 | September 8, 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](#)

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 30TH 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 31ST**.

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



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 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. 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 its 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

The 2026 STEP CPD Audit Has Begun

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 months 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.



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. Winners will be announced at the Awards Ceremony on September 17, 2026 at the London Hilton on Park Lane, in London.

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

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.

STEP Canada is proud to offer this service as a great resource for connecting the highest caliber of trust and estate practitioners to future employers.



[Learn More](#)

Upcoming Events Across the Country

Registration Now Open

STEP Ottawa
September 9, 2026
4:00pm - 7:00pm ET
Social Event

[September STEPping Out
Social Event](#)

STEP Southwestern Ontario
September 10, 2026
12:00pm - 1:00pm ET
Members Only

[TEP Talk](#)

STEP Vancouver Island
September 14, 2026
2:45pm - 5:30pm PT
Special Event
Capacity reached - waitlist available

[Special Chapter Launch Event](#)

STEP Okanagan September 15, 2026 3:00pm - 5:00pm PT <i>Bundle Seminar</i>	STEP Calgary September 15, 2026 4:00pm - 6:00pm MT <i>September Showcase</i>	STEP Saskatchewan September 16, 2026 3:00pm - 5:00pm CST <i>Social Event</i>
Maximize Your Impact: Advanced Strategies for Effective Giving	Welcome Back Seminar and Social: Case Law Update	Tax, Trusts, and Tacos: Trivia and Social Event
STEP Toronto September 16, 2026 5:00pm - 8:00pm ET <i>Social Event</i>	STEP Atlantic September 16, 2026 2:30pm - 4:30pm AT <i>Bundle Seminar</i>	STEP Atlantic September 16, 2026 5:00pm - 7:00pm AT <i>Social Event</i>
Welcome Back Social Event	Send Me Your File	Welcome Back Reception
STEP Edmonton September 16, 2026 4:00pm - 6:00pm MT <i>Social Event</i>	STEP Montreal September 23, 2026 12:00pm - 2:00pm ET <i>Study Session</i>	STEP Southwestern Ontario September 23, 2026 5:00pm - 7:00pm ET <i>Social Event</i>
Welcome Back Networking Event	Conflict of Laws in France-Quebec International Estates	Special Welcome Back Kick-Off Event
STEP Winnipeg September 24, 2026 4:00pm - 7:00pm MT <i>September Showcase</i>	STEP Vancouver September 24, 2026 3:00pm - 5:00pm PT <i>Bundle Seminar</i>	STEP Saskatchewan October 7, 2026 3:00pm - 5:00pm CST <i>Bundle Seminar</i>
Focus Group Discussion and Networking Event	Avoiding Probate: Planning for and Consequences of Having Assets Pass Outside a Will	Probate/Litigation Issues From the Bench
STEP Ottawa October 7, 2026 4:00pm - 5:30pm ET <i>Bundle Seminar</i>		
Baby Steps: What You Need to Know About Fertility Law and Estates		

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-June1, 2027	Registration closed March 1, 2027
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course)	November 2-3, 2026 May 31-June1, 2027	Registration closed March 1, 2027
Essay Submission	October 1, 2026	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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