



Newsletter Vol. 14 | Issue 1 | January 13, 2026

With access to the monthly **STEP Insider**, readers receive the latest news about STEP Canada, branch and chapter activity, national event updates, recent practitioner opportunities, education information, and more!

[STEP Canada Website](#)

[STEP Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

STEP Canada National Webcast

Beyond the Indian Act: A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients

Wednesday, January 21, 2026 @ 12:00pm EDT

Don't miss out! Join us for an engaging webcast exploring how Indigenous, federal, and provincial/territorial laws intersect in wills and estate planning. Gain practical insights into modern treaties and self-government agreements, taxation on-reserve, the Indian Act, and settlement trusts to better serve Indigenous clients and communities.

The Indigenous Peoples of Canada have a unique relationship with Canada and its provinces, which can impact the wills and estates of their members. This important session will discuss:

- A jurisdictional overview of succession/incapacity law addressing modern treaties, self-government agreements, the Indian Act, and provincial/territorial law.
- Taxation on death of on-reserve and off-reserve interests.
- Estate administration under the Indian Act (and the effect of land codes, family homes on reserve, etc., on succession).
- Succession & incapacity planning with property on-and-off reserve.
- The settlement trust (with an emphasis on per capita distributions and individual interests, and impact of death).

This valuable webcast will be broadcast in English, and is offered free of charge for STEP Canada Members and Students.

[Details & Registration](#)

REGISTRATION OPEN: STEP Canada's 28th National Conference



Attended by more than 1,000 trust and estate professionals from across Canada and around the world, STEP Canada's National Conference returns for its 28th year in 2026! Join us on June 1st and 2nd, 2026 at the Sheraton Centre Toronto Hotel for a program full of timely insights, emerging trends, and the return of favorites like the Practitioner Updates and the STEP Canada / CRA Roundtable.

Don't miss out! Demand for this event grows each year, and in-person attendance sells out quickly. To secure your spot and maximize the unmatched networking available onsite, we strongly encourage early registration.

"The STEP conference is always the best in terms of education content and diversity."

This must attend event for practitioners in this industry offers an exceptional mix of networking, practical learning, and continuing education opportunities.

Details & Registration

STEP's Digital Asset Learning Opportunities

It's STEP Webinar Week: Exploring Digital Assets!



As digital assets, and especially crypto-assets, become a staple of modern private wealth and a mainstream component of client portfolios, they introduce complexities, and opportunities, for trusts, estates, and private wealth professionals.

From **January 12-26, 2026**, get ready to dive into the fast-moving world of digital assets with industry experts!

Designed to help you better understand the landscape of digital assets, and translate that knowledge into tangible, client-focused value. Registration is complimentary for STEP members and available for individual webinars or the full series. Each webinar will be recorded and available to view on-demand.

Details & Registration

STEP CPD Learning Course: Digital Assets



Confidently navigate digital assets in estate planning and administration with the knowledge and skill essential for today's digital world.

This course, run by the Global STEP education training partner CLTI, will equip you with the practical tools and expert insight to meet growing client demand, support families during incapacity or bereavement, apply consistent best-practice approaches, and minimise risk by ensuring digital assets are properly identified, valued, and transferred.

An optional end of course assessment comprising 10 multiple-choice questions is included, and upon successful completion, you will receive a certificate to recognise your achievement.

Discounts are available for STEP members and STEP Employer Partners.

Details & Registration

Registration Open for 2025-26 Program Season Events

There is Still Time to Register for the 2025-26 Program Season!

For the past four months, members and delegates have been benefiting from can't-miss networking opportunities and valuable CPD seminars, designed to support professional growth and connections.

If you haven't registered yet, not to worry - there is still time! Whether you are looking to expand your knowledge or connect with fellow trust and estate professionals, there is something for everyone in this season's schedule. We hope to see you at an event before the season is finished!

Did you know: Branch Bundle registrants will have access to online on-demand replays until December 31, 2026?

For more information, click the link below and select your branch or chapter.



2025-26 Seminars & Events

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.



Rhonda Johnson, TEP
Field Law
STEP Edmonton

"I took the Essay Program to receive my TEP, and it was a great way to force myself to pause and do a deep dive into topics in which I had a keen interest, and to discover a community of like minded professional who shared my enthusiasm for certain subjects. I first volunteered with STEP as a Program Officer for my local branch. I was and continue to be impressed by the selfless dedication, professionalism and generosity of STEP members and staff. In committee meetings and at STEP events I am repeatedly humbled and energized by the impressive brain power, mutual respect and kindness present in the room."

Through volunteering on STEP committees and working on various presentations and submissions with fellow TEPs and STEP staff, I have made lifelong friends, shared plenty of laughter, and hugely stretched and deepened my subject matter knowledge. I have also had the good fortune to give, and receive, many cross referrals. My clients' peace of mind is of utmost importance to me, and when I refer them to a fellow TEP, I know with confidence they are in good hands."

Volunteering with STEP fills my tank and makes me feel part of a community where I am valued and respected, and from which I receive tremendous personal and professional growth and networking opportunities. I highly recommend stepping into the ring!"

Rhonda is currently Chair of the 2026 STEP Canada National Conference Program Committee and has served on the committee since 2019. She has also volunteered as Program Officer for the STEP Edmonton Branch Board, was a contributing member of the STEP Canada Trust & Estate Technical Committee, is a regular speaker and moderator for local and national STEP seminars and conferences, and is a contributing author for STEP Inside.

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.

Find Your Local Board Members

Coming Soon: 2026-27 Membership Renewals

At the beginning of March 2026, all STEP Canada members will be mailed their annual renewal package containing details for this year's renewal period, and at the same time your MY STEP account will open for processing membership renewals.

The deadline to renew your membership is April 1, 2026.

Please login to your MY STEP account via the link below to verify that your mailing information and contact details are correct.

Watch your inbox in early March for details on how to renew!

[Login To MY STEP](#)

Recent STEP Canada eNews

January 6, 2026:
STEP Canada Tax Technical Committee
[RE: Technical Amendment Request - Part IV Determination for Assessable Dividends Distributed by a Trust](#)

January 8, 2026:
STEP Canada Tax Technical Committee:
[RE: Support for Comfort Letter Request - Extension of 212.1\(6\)\(b\) Exception to Life Interest Trusts](#)

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.

Did you know we apply for CPD accreditation from these bodies?

- Alberta Insurance Council (AIC) - *if applicable**
- Canadian Investment Regulatory Organization (CIRO) - formerly MFDA
- FP Canada
- The Financial Services Regulatory Authority of Ontario (FSRA)
- The Institute for Advanced Financial Education (IAFE)
- Insurance Council of Manitoba (ICM) - *if applicable**
- Law Society of British Columbia (LSBC)
- Law Society of Ontario (LSO) - *if applicable***

**if seminar is based on insurance*
***only for professionalism hours*

The following bodies recognize STEP activities for continuing education credits with no formal accreditation application required, and the standard issued CPD certificate for verification of hours will suffice for your records:

- Barreau du Québec and the Chambre des notaires du Québec
- Chartered Professional Accountants (CPA)
- Law Society of Alberta
- Law Society of British Columbia - *for substantive hours*
- Law Society of Manitoba
- Law Societies of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador
- Law Society of Ontario - *for substantive hours*
- Law Society of Saskatchewan
- Society of Trust and Estate Practitioners (STEP)

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

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

- [Wills & Estates Associate Lawyer - MLT Aikins LLP \(Edmonton, AB\)](#)

Have questions?

[More on Practitioner Opportunities](#)
or
[Post an Opportunity](#)

Outreach & Development: Find Us in Your Community

| Date & Location | Event & Location | Type of Outreach |
|-----------------|------------------|------------------|
|-----------------|------------------|------------------|

We look forward to engaging with our trust and estate community at courses and industry events.

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 | Registration is open on a rolling basis. Final course assessment must be taken within 12 months from enrollment. |
| STEP Canada Diploma Program (All Courses) | May 25, 2026 | March 1, 2026 |
| NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course) | May 25, 2026 | March 1, 2026 |
| Essay Submission | May 1, 2026 | 2025 topics can be found here |

Education Program Updates

Diploma Program:

As we begin the Spring 2026 term, please review your course portal to review the course outline and course text.

Your course portal provides information and dates about the Instructor Q&A board. Details about tutorial sessions will be announced soon on your classroom – stay tuned!

CETA 1-4 Students:

Starting January 2nd, all CETA exams are now available on-demand via your classroom. Please review the exam section of your classroom for further details and ensure you complete your exam by your deadline to avoid re-registration requirements.

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.

Login To MY STEP

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. Find full details below!

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.

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

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

Follow STEP Canada's LinkedIn Page

Searchable Resource Tool (SRT)

Reminder: As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since its launch in March 2022 there have been more than 13,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years' worth of content, including recent events such as the 2024-25 Branch Bundle seminars and the 2025 National Conference.

Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

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.

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