



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!

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**22nd National Conference 2020  
Early Bird Pricing!**

**Save \$100 When You Register  
by February 29th!**

Early-bird pricing applies to both full-members and non-members. Discounted student pricing is also available to active students. [Click here for details and registration!](#)

*Early-bird pricing expires February 29th at 11:59 PM EST.*



View the **full program** with expert speakers and insightful sessions here!

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## 2020 Full Day Course - Taxation of Trusts and Estates

**Tour dates:**

January 22, Toronto, ON  
January 23, Cambridge, ON  
January 28, Montreal QC  
January 29, Ottawa, ON  
February 11, Edmonton, AB  
February 13, Winnipeg, MB  
February 18, Calgary, AB  
February 20 Saskatoon, SK  
February 25, Kelowna, BC  
February 27, Vancouver, BC  
March 10, Halifax, NS

Register early [here](#) - some cities already at capacity!

**Featuring Expert Instructors:**



Grace Chow, FCPA, FCA, TEP



Ian Pryor, LLB, TEP

**Attendee Testimonial:**

*"This was an excellent presentation. The speakers were very good, very knowledgeable and presented the material very efficiently. In my view, this was a very good presentation; the material presented was precise, concise and very practical. I would recommend this course to anyone involved in trust, estate and/or tax."*

**Canada**  
ADVISING FAMILIES ACROSS GENERATIONS

**A FULL-DAY COURSE | 2020**

# TAXATION OF TRUSTS AND ESTATES

Tour sponsor  
**MILLER THOMSON**  
ADVOCATS | LAWYERS

[www.step.ca](http://www.step.ca)

## Introducing the MFA-P: Special Offer for STEP Members

Offered by CAGP in collaboration with the Knowledge Bureau and Spire Philanthropy: Master Financial Advisor-Philanthropy! The MFA-P, provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies. Learn to have fruitful discussions, address big fears, and plan for solutions. [To learn more, please review the brochure here.](#)



*"The MFA-P designation is an important new pedigree for estate planning professionals, and I was delighted to participate in developing the curriculum, and now to add the designation to my credentials."*



Mark Halpern CFP, TEP, MFA-P

Let's connect: [www.knowledgebureau.com](http://www.knowledgebureau.com)  
1-866-953 4769 | [registrar@knowledgebureau.com](mailto:registrar@knowledgebureau.com)

## CAREER CENTRE

Seeking new professional ventures? STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest calibre of trust and estate practitioners to employers.



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

**Director, Tax and Estate Planning -**  
 IG Wealth Management, Toronto, ON

**Manager, Tax and Estate Planning - IG**  
 Wealth Management, Toronto, ON

**Leader, High Net Worth Consultation**  
**Team** - Edward Jones, Toronto, ON

**Senior Wealth Consultant** - Edward  
 Jones, Toronto, ON

**Team Leader, Income Tax** - RBC Wealth  
 Management, Toronto, ON

**Director, Trust Officer** - BMO Trust  
 Company, Winnipeg, MB

## EDUCATION CENTRE

### Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines*
<b>CETA 1</b>	Accessible at any time	Exams must be completed within 6 months of registration
<b>CETA 2-4</b> (English & French)	March 2, 2020 June 1, 2020 September 8, 2020	<i>Registration Closed</i> May 1, 2020 August 8, 2020
<b>STEP Diploma Program</b> (English & French)	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
<b>Essay Submission</b>	May 1, 2020 October 1, 2020	-

*\*It is recommended that you register in advance of this deadline to ensure sufficient preparation time.*

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## STEP Diploma Program

Course outlines have been added to the e-classrooms; this document is mandatory reading. Students are reminded that course information is communicated through the course website. It is the student's responsibility to check for course announcements.

[Contact Education](#)  
[More on Assessment by Exam \(Diploma Program\)](#)

## Essay Submission

Our essay submission process has changed. Students must now submit essays through the online STEP Learning Centre. To submit an essay, students must log in at [step.ca](#) and purchase an "essay submission". Students will then receive access to the "Online Learning Centre" and additional instructions on essay submission. The essay topics for 2020 have been posted at [step.ca](#).

[Contact Education](#)  
[More on Assessment by Essay](#)

## CETA

STEP Canada is pleased to announce that the CETA program has been re-designed to allow for a "fast track" option for those students who wish to progress through the program more quickly. The CETA program can now be completed in as little as one year. The CETA 1 Foundations course no longer has a fixed examination date, the exam can be completed at anytime within 6 months of registration. CETA 2-4 will have exam sessions in March, June, and September.

For more information, please email [education@step.ca](mailto:education@step.ca)

## Mentorship Program & Study Groups

STEP Canada's Volunteer Mentorship Program is grounded in STEP's ongoing mandate to advance practitioner knowledge. If you are able to dedicate two hours per month to help groom and foster relationships with our next generation of STEP members, please reach out to our education team

[Contact Education](#)

# BRANCH EVENT CENTRE

We are pleased to be able to offer a glimpse of our 2019-20 Education Seminars & Events.  
Please see hyperlinks below for additional information.

Wed  
Feb  
12

### Ottawa Branch

*Succession Planning in Family Business: tips and Tricks to Help Your Clients Bridge the Generation Gap*

Thurs  
Feb  
20

### Vancouver Branch

*Born in the USA? Canadian Planning for US Clients*

Thurs

### Montreal Branch

Thurs

### Edmonton Branch

Feb  
13

*Developments in Transparency, Including the  
Federal Beneficial Ownership Register and  
Quebec's Approach to Aggressive Tax Planning*

Feb  
20

*Breaking Up is Hard to Do - Why Clients Need  
Shareholder Agreements*

Wed  
Feb  
19

**Toronto Branch**  
*The Modern Family*

Tues  
Feb  
25

**Calgary Branch**  
*That's Not What I Meant, Or Was It?*

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**Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | [step.ca](http://step.ca)**

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STEP Canada  
45 Sheppard Avenue East  
Suite 510  
Toronto, Ontario M2N 5W9  
CA