



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 STEP/CRA Round Table:

### We Want Your Questions!

The **STEP/CRA Round Table Committee** invite all STEP Canada members to submit questions for consideration. If selected, **your question(s) will be presented at the highly anticipated round table session!**



**SAVE THE DATE!**

*STEP Canada's 22nd National Conference  
June 11 and 12, 2020*

[Submit a Question](#)

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

**Registration is filling up, with select cities at capacity - register early!**

The Full Day Course is designed for mid- to senior-level practitioners who work with trusts and their tax implications and who wish to gain deeper insight into taxation of trusts. Highlights include technical tax issues, planning inter vivos trusts, 21 year rule options and more. [For more information and to register, please visit the website here.](#)



## Stay Connected!

Our network is growing! Please follow the link to [STEP Canada's corporate LinkedIn](#) page where you can find direct links to all STEP Branch & Chapter Group pages! For more information, please review our [LinkedIn Cheat Sheet!](#)



## Family Enterprise Advisor (FEA) Program Special Offer for STEP Members

The Family Enterprise Advisory Program is the only program designed to help advisors augment their formidable technical skills and showcase their commitment to Family Enterprises. Create deeper relationships with family enterprise clients with the FEA program. For more information, and testimonials, [click here!](#)



*Be fluent in family enterprise.*

To learn more, please contact Tim Mohr: [tmohr@family-enterprise-xchange.com](mailto:tmohr@family-enterprise-xchange.com)  
1-866-849-0099 ext. 225 | [family-enterprise-xchange.com](http://family-enterprise-xchange.com)

## Introducing a New Designation: 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](#).



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 Opportunities](#)  
[Post an Opportunity](#)

**Senior Trust Advisor** - RBC Royal Trust, Toronto

**Trust Officer** - The Platinum Group, Island of Bermuda

## EDUCATION CENTRE

### Exam Sitings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA (English & French)	March 2, 2020	February 2, 2020
STEP Diploma Program (English & French)	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
Essay Submission	May 1, 2020 October 2, 2020	-

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

**Certificate in Estate and Trust Administration (CETA)** The next CETA exam session is March 2, 2020. To register, log into your account at [www.step.ca](http://www.step.ca) before February 2, 2020.

Contact Education  
[More on CETA](#)

**STEP Diploma Program** The grades for the Fall 2019 term will be posted to student accounts at [www.step.ca](http://www.step.ca) by December 12, 2019. An announcement will be posted to the e-classroom once the marks have been released for your course. If you wish to register for your next course ahead of receiving your grade, please email [education@step.ca](mailto:education@step.ca) and request provisional registration.

[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](http://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 202 will be posted by December 15, 2019.

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

**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 below.

[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.

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## Happy Holidays from STEP Canada!

Thank you to all the valued members and friends of STEP Canada who have made 2019 such a memorable and successful year.

Wishing you all a very happy holiday season and a wonderful New Year.

**We look forward to working with you in 2020!**

Please note, the STEP Canada National Office will be closed 2:00 pm on Tuesday, December 24th, reopening 9:00 am Wednesday, January 2nd.



[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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