



## Welcome to the STEP Canada Insider

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

## Next Scheduled Branch & Chapter Events

[Click here](#) to discover upcoming regional branch and chapter events.



## Practitioner Opportunities

Visit our [online job board](#) any day of the week for the most up-to-date job postings.

[Lawyer - Underwood Gilholme, Calgary, AB](#)

[Estate & Trust Litigation Lawyer - Legacy Tax + Trust Lawyers, Vancouver, BC](#)

[Estate and Trust Advisor - MD Financial Management, Various Locations Across Canada](#)

[Estate and Trust Advisor - MD Financial Management, Moncton, NB](#)

[Wealth Strategist - CIBC, GTA West, ON](#)

## Education Center

### Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 16, 2019
Assessment by Exam (Diploma Program)	May 27, 2019 November 4, 2019
Assessment by Essay	May 1, 2019 October 1, 2019

### French Education Program

The French Civil Law diploma program is open for registration; the registration deadline is May 1, 2019. The first exam sitting for CETA 1 - Civil Law is September 16, 2019; the registration deadline is August 16, 2019. For more information regarding our French programs and registration, please visit

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust and estate industry who are seeking new professional ventures, and offers employers the chance to connect with qualified people. STEP members receive a discounted rate to post on our [job board](#).

We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week. The STEP Canada [website](#) receives more than 3,500 visits per month, and traffic is driven to the [Practitioner Opportunities page](#) via our monthly e-newsletter, the STEP Insider, which is shared with our membership of over 2,600 potential candidates. To learn more about this service, please [click here](#).

Visit our online job board today!



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

Learn More

[www.step.ca/french](http://www.step.ca/french) or email [Education - French Program](mailto:Education - French Program).

### Certificate in Estate and Trust Administration (CETA)

Grades for the Spring 2019 CETA exams have been released to students via email. CETA courses are open for registration, log into your STEP Canada account to register for the next course. Please note that the registration deadline to enroll for the next CETA course is August 16, 2019. It is recommended that you register in advance of this deadline to ensure sufficient preparation time. Please send CETA program inquiries to [education@step.ca](mailto:education@step.ca).

### Assessment by Exam (Diploma Program)

The next exam date is May 27, 2019. Exam location and instructions will be sent to students on April 15, 2019. Registration for the May 2019 exam remains open; the registration deadline is May 1, 2019. Please send registration inquiries to [education@step.ca](mailto:education@step.ca).

### Assessment by Essay

Revised essay topics for 2019 are now available on the STEP Canada website. The submission dates are May 1 and October 1, 2019. Essays are to be submitted with appropriate documentation to [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 can dedicate two hours per month to help groom and foster relationships with the next generation of TEP members, please complete this [mentor survey](#) to apply. For more information and application details, please contact [education@step.ca](mailto:education@step.ca).

Students interested in forming a study group, please add your contact information to the online [Study Partners Google Document](#). While STEP Canada does not formally arrange study groups or pairings, we hope this document will assist students in organizing their own meetings.

Contact Education

## 21ST NATIONAL CONFERENCE



**JUNE 6-7, 2019**  
METRO TORONTO CONVENTION CENTRE

### **Less Than Two Months Away! Don't Forget The Social Event!**

Our 21st National Conference is set to take place on June 6-7 at the Metro Toronto Convention Centre. Delegates will have the opportunity to benefit from CPD across the strategically planned program. STEP Canada has secured specialized accreditation from various professional bodies, follow the link to view a complete list - CPD Accreditation.

Delegates will also benefit from valued networking opportunities with over 780 practitioners from across the globe and are pleased to be able to extend an enhanced opportunity connect with friends and colleagues at our social event to be held at Arcadian Court on June 6, 2019 at 7:00 pm. The evening will feature a networking reception with beverages and hor d'oeuvres, followed by a three-course meal with wine, and special remarks. We hope to see you there!

**WHERE:** [Metro Toronto Convention Centre](#) | Level 700 - South Building | 222 Bremner Blvd. Toronto, ON  
**ACCOMODATION:** [InterContinental Toronto Centre](#) | 225 Front Street West, Toronto, ON | for reservations: "[STEP Canada 2019](#)" | Nightly Group Rate: \$319.00 (plus applicable taxes) per single or double occupancy based on availability

**QUESTIONS?** STEP Canada | 416.491.4949 x221 | [memberservices@step.ca](mailto:memberservices@step.ca)

Register Now



### **National Volunteer Week April 7 - 13, 2019**

**National Volunteer Week** is an opportunity to celebrate the impact of volunteer service and the power of all the incredible contributions of our volunteers. **STEP** would like to acknowledge and thank everyone for your continuous efforts, hard work and dedication to this organization. We wouldn't be able to excel without your support. **Thank You!**

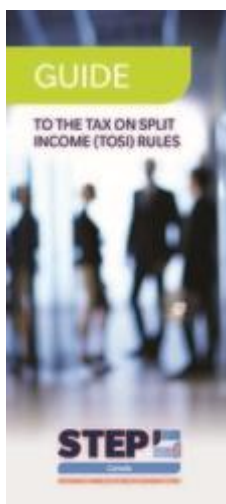


## 2019 Budget Webcast

Earlier this month, the Tax Technical Committee of STEP Canada produced a valuable and important technical summary of the 2019 Budget. [Maureen Berry](#) LLM, TEP; [Robin MacKnight](#) LLM, TEP; and [Chris Ireland](#) CPA CA, TEP discuss and highlight areas of importance to trust and estate practitioners with key takeaways within areas that include beneficial ownership and trust reporting, Section 84.1 and pipeline updates.

[Click here](#) for a PDF of the presentation deck, to watch the recorded webcast via YouTube follow this link: <https://youtu.be/FcLNnM4dQo8>

## STEP Canada's Guide to the Tax on Split Income (TOSI)



STEP Canada members should have received both a digital and hardcopy version of the *STEP Canada Guide to the Tax on Split Income*. We would like to extend a special note of appreciation to [Kevin Wark](#), LLB, CLU, TEP for his time in authoring the guide and to the several members the STEP Canada Tax Technical Committee for reviewing, including [Maureen Berry](#) LLM, TEP and [Chris Ireland](#), CPA CA, TEP.

An electronic PDF version may be viewed by following the link: [STEP Canada TOSI Guide](#)

## 2019/20 Membership Renewal

Annual membership fees were due as of April 1st, 2019. Notification letters have been sent to all members and students via Canada Post last month, and an email reminder was sent last week. Members can submit payment by visiting [www.step.ca](http://www.step.ca) and signing into their **STEP Canada** account. Members may also pay over the phone by contacting our member services department at 1-877-991-4949 x221.

**STEP Canada** continues to deliver opportunities of unparalleled education, representation and networking to its members. We look forward to another successful year and thank you for your continued support.



### **There's Still Time! STEP Private Client Awards 2019/2020**

The **STEP Private Client Awards** are seen as the hallmark of quality within the private client industry and are open globally to both STEP members and non-members. These prestigious awards recognize and celebrate excellence within the industry. All entries undergo a rigorous judging process and judging is supported by an independent panel of experts, comprised of internationally renowned practitioners in wealth management. Last year STEP Canada was proud to announce not one, but two Canadian winners!

This year's awards ceremony will be held on September 25, 2019 in London, UK. This black-tie event attracts over 700 private client practitioners and offers exceptional networking opportunities. For more information about the Private Client Awards and how to submit an entry, please visit [www.steppca.org](http://www.steppca.org).

### **Upcoming Industry Events**

STEP Canada is excited to connect with industry professionals to discuss our routes to membership and the many benefits of a TEP designation.

- April 12 | Montreal | CAGP | [CAGP's 26th National Conference on Strategic Philanthropy](#)

#### **Sponsored Breakfast Session: STEP Canada: Recent Trust and Estate Case Law Decisions**



Gift planners, fundraisers, professional advisors and senior industry leaders will benefit from attending this special session by two esteemed STEP members as they provide insight on recent and important case law, including decisions on Henson trusts, multiple wills, beneficiary designations, and discretionary decisions by trustees. Decisions from both common- and civil-law jurisdictions of interest to the gift and estate planning industries will be examined through the lens of designated Trust and Estate Practitioners (TEPs). An opportunity to learn about the most important and juicy cases while enjoying your breakfast juice!

**Janet Michelin**, BCL, LLB, TEP, Montreal: IMK SENCRL/LLP

**Richard Niedermayer**, LLB, TEP, Halifax: Stewart McKelvey; Director at Large, STEP Canada

## Upcoming Branch & Chapter Events

STEP Canada branches and chapters have an exciting 2018-19 program planned for this fall. The STEP Value Passport is also available for applicable branches and chapters. For more details, [click here](#) to access branch/chapter microsites.

### Toronto Branch

Wednesday, April 10  
[Non-Tax Issues in Succession Planning](#)

### Calgary Branch

Wednesday, April 24  
[Case Law Update](#)

### Atlantic Branch

Thursday, May 2  
[5th Annual Sparkling Reception](#)

### Ottawa Branch

Wednesday, May 8  
[Dispositions, Designations, and Other Dilemmas Involving Real Estate](#)

### Montreal Branch

Thursday, May 9  
[Canada US Tax: Planning for Tax Efficiency & Annual Branch Meeting](#)

### Vancouver Branch

Thursday, May 9  
[So Your Clients Are Separating.... Implications to Their Wealth Planning & Annual Branch Meeting](#)

### Okanagan Chapter

Tuesday, May 14  
[Protecting Clients from Their Children's Family Law Claims & Annual Chapter Meeting](#)

### Winnipeg Branch

Tuesday, May 14  
[Prevention, Detection and Solutions to Elder Abuse & Annual Branch Meeting](#)

### Saskatchewan Chapter

Wednesday, May 15  
[2019 Tax Update](#)

### Southwestern Ontario Chapter

Wednesday, May 15  
[Elder Law & Planning for the Aging & Annual Chapter Meeting](#)

### Edmonton Branch

Thursday, May 23  
[What's New with Wills – the Weird and the Wonderful & Annual Branch Meeting](#)

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