



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.

[Regional Trust Officer - MD Financial, Calgary, AB](#)

[Regional Vice-President, Wealth Planning \(Tax\) - Assante Private Client, Toronto, ON](#)

[Director, Wealth Strategist - CIBC, Montreal, QC](#)

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

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA (English & French)	September 16, 2019
Assessment by Exam - Diploma Program (English & French)	November 4, 2019
Assessment by Essay	October 1, 2019 May 1, 2020

French Education Initiatives

The French Civil Law diploma program is open for registration for the November 4, 2019 exam; the registration deadline is October 4, 2019. The first exam sitting for CETA 1 (French) - Cours de base en administration de successions et de fiducies is September 16, 2019; the registration deadline is August 16, 2019. For more

driven to the [Practitioner Opportunities page](#) via our monthly e-newsletter, the STEP Insider, which is shared with our membership of over 2,700 potential candidates. To learn more about this service, please [click here](#).

Visit our online job board today!



www.step.ca/opportunity

Learn More

New Look for www.step.ca!

STEP Canada has never been stronger! We are pleased to report we have now grown to over 2,700 members since our beginning in 1998. Our members are important to us and the reason we strive for excellence in all we provide. Many of you have likely already had the opportunity to experience the new [STEP Canada site](#) and we encourage those who haven't to take some time and familiarize yourself with the new design, we hope you are all as excited as we are and find it easy to navigate. As always, we are here to guide you through the process should you have any questions - memberservices@step.ca or (416) 491-4949 x221.



information regarding our French programs and registration, please visit www.step.ca/fr or email education@step.ca

Certificate in Estate and Trust Administration (CETA)

STEP Canada's new online learning centre is now live! Students will be notified by email by July 12, 2019 with instructions on how to access the new learning centre. The next exam sitting for CETA (English) is September 16, 2019; the registration deadline is August 16, 2019. It is recommended that you register in advance of this deadline to ensure sufficient preparation time. Please send all CETA program inquiries to education@step.ca

Assessment by Exam (Diploma Program)

We are excited to announce STEP Canada's new online learning centre for both the French and English programming is now live! Students that have already registered for courses will be notified by email with instructions on how to access their e-classroom for the course by July 12, 2019. Grades from the Spring 2019 term will be released by July 10, 2019 and may be found online by accessing your STEP Canada account at www.step.ca. The next exam date is November 4, 2019, the registration deadline is October 4, 2019. The next exam date is November 4, 2019, the registration deadline is October 4, 2019. Important – Exams will be taken online in the new online learning centre, there are no longer exam reporting centres. Information about exams can be found in the online learning centre inside the e-classroom for your course.

Please note that due to the re-development of our website, links to the student resources that were used in the past, are no longer active – You must sign in at www.step.ca to access your course resources.

Assessment by Essay

The next essay submission dates are October 1, 2019 and May 1, 2020. The essay submission process will be changing for the next intake date. Essays and required documentation must now be submitted through our new online learning centre. More information will be provided closer to the submission dates. Grades from the May 2019 intake will be released via email by July 10, 2019.

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 complete this [mentor survey](#) to apply. For more information and application details, please contact education@step.ca

Contact Education



21ST NATIONAL CONFERENCE

JUNE 6-7, 2019
METRO TORONTO CONVENTION CENTRE



Meet your 2019-20 Board of Directors!

STEP Canada is excited to formally introduce our new 2019-20 Board of Directors.

STEP Canada Board of Directors



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STEP Canada Welcomes Lucie Beauchemin



STEP Canada is pleased to announce the addition of Lucie Beauchemin to the National Office. Acting as our Quebec Membership Development Consultant, Lucie will focus on membership development in the Quebec area. Please join us in welcoming her to the team!

pqdevelopment@step.ca



Finalists Announced

Seen as a hallmark of quality within the private client industry, we are incredibly excited to reveal the Canadian finalists for the **14th Annual STEP Private Client Awards**. Winners will be announced at the awards celebration on September 25, 2019 in London, England. More information on these awards and ticket purchase may be found at www.steppca.org.

These prestigious awards are open globally to both STEP members and non-members and recognize the excellence among private solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors. It's a proud time for **STEP Canada** as we announce the following finalists. Join us in wishing each of them the best of luck!



Boutique Firm of the Year



Charity Team of the Year



International Legal Team of the Year



Investment Team of the Year



Private Client Legal Team of the Year

2019-20 Membership Renewals

Annual membership fees were due as of April 1st, 2019. To avoid suspension in August 2019, please submit payment as soon as possible. We will commence contacting all members with outstanding fees this week and encourage those who have yet to submit payment to do so either online at www.step.ca or by contacting member services at memberservices@step.ca or 416-491-4949.

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.

2019-20 Branch Passport Sales

Branch passports for the 2019-20 educational season will be open for purchase as of August 2019. All members will receive an email when available and encourage members to take advantage of this opportunity. Preliminary programming for the 2019-20 educational season is also now available and may be found together with branch passport information through accessing your [Branch Events](#) page.

2019-20 Branch & Chapter Events

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

Atlantic Branch

[2019-20 Preliminary Program](#)

Check back soon for passport details!

Calgary Branch

[2019-20 Preliminary Program](#)

Check back soon for passport details!

Edmonton Branch

[2019-20 Preliminary Program](#)

Check back soon for passport details!

Montreal Branch

Check back soon for preliminary programming and passport details!

Okanagan Chapter

[2019-20 Preliminary Program](#)

Ottawa Branch

[2019-20 Preliminary Program](#)

Check back soon for passport details!

Saskatchewan Chapter

[2019-20 Preliminary Program](#)

Southwestern Ontario Chapter

[2019-20 Preliminary Program](#)

Toronto Branch

[2019-20 Preliminary Program](#)
Check back soon for passport details!

Vancouver Branch

[2019-20 Preliminary Program](#)

Winnipeg Branch

[2019-20 Preliminary Program](#)
Check back soon for passport details!

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