



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

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 2,700 potential candidates.

## Education Center

### Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 16, 2019
Assessment by Exam (Diploma Program)	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 - Civil Law is September 16, 2019; the registration deadline is August 16, 2019. For more information regarding our French programs and registration, please visit [www.step.ca/fr](http://www.step.ca/fr) or email [education@step.ca](mailto:education@step.ca)

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

## New Look for [www.step.ca](http://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](mailto:memberservices@step.ca) or (416) 491-4949 x221.



## Certificate in Estate and Trust Administration (CETA)

STEP Canada is transitioning to a new online learning platform scheduled to launch July 2019. Course content will be available in your online account at [www.step.ca](http://www.step.ca) under "Student Study Resources". Please note sample quizzes and supplementary resources will be available once the new learning platform is live. 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)

Grades from the Spring 2019 term will be released by July 10, 2019 and may be found online through accessing your STEP Canada account at [www.step.ca](http://www.step.ca). The next exam date is November 4, 2019, the registration deadline is October 4, 2019.

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](http://www.step.ca) to access your course resources.

The Diploma program is going online! Stay tuned for more information.



We are excited to announce STEP Canada's new online learning centre will include an interactive space for students to discuss course content and arrange student-organized study groups. In the interim, students interested in forming a study group may add their 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.

## 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.

## 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](mailto:education@step.ca)

Contact Education



## 21ST NATIONAL CONFERENCE

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



### **A Remarkable Success! Thanks to All!**

STEP Canada's ongoing mandate to advance practitioner knowledge would not be possible without the endless and generous support provided by all our volunteers, committees, speakers and moderators. We simply would not be able to host the **largest STEP conference** in the world, without the incredible assistance received by practitioners across the country. For all who dedicated their time, knowledge and expertise through speaking and moderating, thank you once again.

To our sponsors of all levels, thank you once again! It is through your generosity that we are able to produce a conference of this calibre.

Our social event was a delightful evening that saw almost 400 guests with special remarks by our platinum sponsor, RBC, who helped make the evening so memorable.

STEP Canada's 21st National Conference saw almost 800 delegates this year, 75 speakers over 19 sessions. Thank you to our keynote luncheon speakers, Dr. Jay Olshansky and Caren Croland Yanis, who both delivered outstanding presentations.

We invite all our members to join us at the 22nd National Conference on Thursday, June 11 – Friday, June 12, 2020!





## 2019 Student Reception & Awards Celebration

Thank you to all who attended the 2019 Student Reception & Awards Celebration on Thursday. Together we acknowledged the outstanding achievements made by our 2018 graduates and had the opportunity to network with STEP Canada and STEP Worldwide senior executives, as well as past award recipients.



## Upcoming 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.

### Montreal Branch

Thursday, June 13  
[Tax, Trust and Estate Pot Pourri](#)

### 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!*

### Okanagan Chapter

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

### Ottawa Branch

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

### Saskatchewan Chapter

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

### Southwestern Ontario Chapter

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

### Toronto Branch

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

### Vancouver Branch

[2019-20 Preliminary Program](#)  
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### Winnipeg Branch

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