



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.

[Tax & Estate Planning Manager - Empire Life, Toronto, ON](#)

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

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

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	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 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 or email education@step.ca.

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. To learn more about this service, please [click here](#).

Visit our online job board today!



www.step.ca/opportunity



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 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.



Certificate in Estate and Trust Administration (CETA)

STEP Canada is transitioning to a new online learning platform that will be available in July 2019. Course content will be available in your online account at www.step.ca under "Student Study Resources", please note that the 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.

Assessment by Exam (Diploma Program)

The next exam date is May 27, 2019. Registered students were sent an email with their exam time and location, in addition to an email regarding the electronic exam platform. If you did not receive the electronic exam email, please check the student resources section in your online account at www.step.ca. If you did not receive the email with your exam time and location, please email education@step.ca.

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.

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



Assessment by Essay

The next essay submission dates October 1, 2019 and May 1, 2020. Essays are to be submitted with appropriate documentation to 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.

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.



21ST NATIONAL CONFERENCE



JUNE 6-7, 2019
METRO TORONTO CONVENTION CENTRE

Just Four Weeks Left!

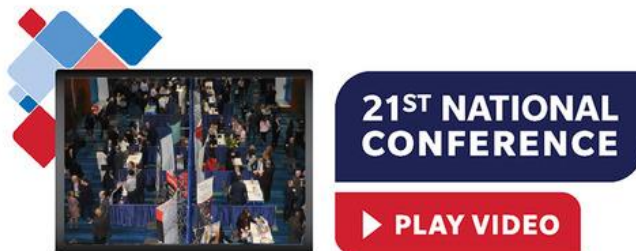
There is only four weeks left to register for the highly anticipated **STEP Canada 21st National Conference!**

A key element of STEP's ongoing mandate is to provide a forum for discussion and advancement of practitioner knowledge of relevant tax, accounting, administration, statute and case law through regular branch seminars, symposia and the [STEP Canada National Conference](#). We are excited to be offering two unique days filled with invaluable, practical, and timely discussions through plenary and concurrent sessions to best provide practitioners from all disciplines with information what will greatly enhance the value of their practice. Follow the link for a [complete program](#) featuring many sought-after speakers.

Delegates will be offered access to the STEP Canada native conference app; pre-loaded USBs; breakfast, lunches; and health breaks; a traditional conference binder of conference materials (priced separately); an awesome conference delegate backpack loaded with swag; and access to many industry-related organizations whose services will be showcased throughout the exhibit hall.

The **STEP Canada National Conference** has established itself as a must-attend event for both Canadian and international practitioners as well as our partnering sponsors.

See what our 2018 delegates had to say:



From our 2018 delegates:

"I was very impressed... [O]verall one of the best tax conferences I have attended in my career."

"[The conference] shoots the lights out!"

"This is by far the best, most informative industry conference (when comparing content) in Canada."

WHERE: [Metro Toronto Convention Centre](#) | Level 700 - South Building | 222 Bremner Blvd. Toronto, ON
ACCOMODATION: [InterContinental Toronto Centre](#) | 225 Front Street West, Toronto, ON

Please note the reduced rate room block has reached maximum capacity as of April 30th, 2019. While the InterContinental Toronto Centre may still have availability, it will unfortunately no longer be at the reduced rate. For more information on other nearby properties, please follow the links below.

QUESTIONS? STEP Canada | 416.491.4949 x221 | memberservices@step.ca

Register Now



**Student Reception & Awards Celebration
June 6, 2019
Metro Toronto Convention Centre**

The Education and Student Liaison Committee Chairs would like to invite all STEP Canada students to attend the **Annual Student Reception & Awards Presentation** on Thursday, June 6th at the Metro Toronto Convention Centre - Room 401 from 5:00 pm to 6:00 pm. This reception celebrates the outstanding achievements made by of our 2018 graduates and offers students with the opportunity to network with STEP Canada and STEP Worldwide senior executives as well as past award recipients. While this takes place on the first of our two-day national conference, registration to the conference is not required to attend this event. For more information or to register for this fantastic networking opportunity, please follow the link - [2019 Annual Student Reception & Awards](#).



2019/20 Membership Renewal

Annual membership fees were due as of April 1st, 2019. To avoid suspension, please submit payment as soon as possible. Members can pay online by visiting www.step.ca and logging into their personal account. Payment may also be submitted over the phone by contacting member services 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.



As part of our 2019/20 Membership Renewal campaign, all 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](#)

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.

- May 16 | Montreal | Canadian Tax Foundation - Estate Planning & Trusts

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.

Okanagan Chapter

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

Winnipeg Branch

Tuesday, May 14
[Elder Abuse and Power of Attorney & Annual Branch Meeting](#)

Saskatchewan Chapter

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

Southwestern Ontario Chapter

Wednesday, May 15
[Vulnerable Clients: Dealing with Diminished Mental Capacity and Elder Abuse & Annual Chapter Meeting](#)

Toronto Branch

Wednesday, May 22
[How to Help Your Clients Choose the "Right" Fiduciaries & Annual Branch Meeting](#)

Calgary Branch

Thursday, May 23
[Fixing Mistakes in Wills and Taxes: What can you do? What can't you do? And where is the Line?](#)

Edmonton Branch

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

Montreal Branch

Thursday, May 23
[Recent Tax Department Interpretations, Court Decisions and New Legislative Measures & Annual Branch Meeting](#)

Atlantic Branch

Thursday, May 30
[Winding Up a Complex Estate](#)

Ottawa Branch

Check back soon! 2019-20 program and passport details will be made available at a later date.

Vancouver Branch

Check back soon! 2019-20 program and passport details will be made available at a later date.

NATIONAL

Wednesday, June 5
Annual General Meeting

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