



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 Question Collection

**SAVE THE DATE!**  
*STEP Canada's 22nd National Conference*  
**June 11th and 12th, 2020**

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**.

[Submit a Question](#)

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

Registration is now open for the 2020 STEP Canada Full Day Course. This course is designed for 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!

*STEP Canada is actively working towards growing its presence on social media!*

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

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

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

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](#)

**Team Leader, Income Tax** - RBC, Vancouver or Calgary  
**Income Tax Specialist** - RBC, Calgary  
**Trust and Estate Advisor** - MD Financial Management Ltd. Halifax  
**Senior Trust Advisor** - RBC Royal Trust, Toronto  
**Trust Officer** - The Platinum Group, Island of Bermuda

## EDUCATION CENTRE

### Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates	Registration Deadlines
<b>CETA</b> <i>(English &amp; French)</i>	March 2, 2020	February 2, 2020
<b>Assessment by Exam - Diploma Program</b> <i>(English &amp; French)</i>	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
<b>Assessment by Essay</b>	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)

Grades from the Fall 2019 term were released in October. To view your grade and register for the next course, log into your account at [www.step.ca](http://www.step.ca)

[Contact Education](#)  
[More on CETA](#)

## Assessment by Exam (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 11, 2019. 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 \(Diploma Program\)](#)

## Assessment by Essay

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.

[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.

Wed Nov 13	<b>Ottawa Branch</b> <i>Reasonable Expectations: How to Plan for Privacy in Times of Increased Transparency</i>	Tues Nov 26	<b>Okanagan Chapter</b> <i>Valuation of Businesses</i>
Wed Nov 13	<b>Toronto Branch</b> <i>Common Estate Planning Slips – Identifying the Common Mistakes and What Should Be Done</i>	Thurs Nov 28	<b>Calgary Branch</b> <i>Budget 2019, Trust Reporting &amp; Tax Update</i>
Tues Nov 19	<b>Winnipeg Branch</b> <i>A Deep Dive into TOSI: One Year Later</i>	Mon Jan 13	<b>Saskatchewan Chapter</b> <i>5th Anniversary Celebration: Tax Update for 2020</i>
Wed Nov 20	<b>Southwestern Ontario Chapter</b> <i>Don't Guess: Crossing the Canada/US Border</i>	Thur Jan 16	<b>Atlantic Branch</b> <i>Avoiding and Dealing with Insolvent Estates</i>
Thurs Nov 21	<b>Edmonton Branch</b> <i>Liability Issues in the Financial Industry</i>	Thurs Jan 23	<b>Vancouver Branch</b> <i>Year in Review</i>
Thurs	<b>Montreal Branch</b>		

Nov  
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*Hot Topics in Insurance Planning*

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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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