



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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All **STEP Canada staff** are working from home until further notice. Members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to memberservices@step.ca and our team will forward your message to the right staff member.

Membership Renewal Fees – due date extended to June 30

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

**STEP Canada 2020/Coronavirus Update -
April 7, 2020**

The health, safety and wellbeing of our volunteers, members, employees, their families, and our communities is of utmost concern to STEP Canada.

For STEP Canada's April 7th, 2020 coronavirus update, [please click here](#).

Good News

New Public-Facing Website: <https://advisingfamilies.org/canada/>

The new website provides information to help families plan for their futures. Members, please consider sharing this website with your clients, it is a useful tool for providing clarity about these complex issues. Thanks to the Member Services Committee for its work on this beneficial project.

STEP Canada TOSI Guide

First released to members in March 2019, an electronic update to this excellent resource will be forthcoming at the end of April.

New Channels

STEP Canada is actively investigating other options for delivering the valued technical content to our members. In the meantime, we will be looking back to some of our best conference panels from previous years (as rated by delegates) and sharing the presentations with our members.

STEP Canada 22nd National Conference 2020

UPDATE - 22nd National Conference

STEP Canada is sensitive to how current events may be causing stress and anxiety to our conference supporters; we would like to do what we can to alleviate this. As previously announced, we have updated our cancellation policy. Any delegates or sponsors who wish to withdraw from the conference will receive a full refund, no administration fee will be charged.

The executive committee and senior staff are reviewing logistical issues with venues and suppliers, and giving careful consideration to the changing financial impacts to STEP Canada as government agencies and organizations respond to the COVID-19 threat. We appreciate everyone's patience while we navigate the coming weeks. If the decision is made to cancel the conference (or the venue is unable to host us), rest assured that all remaining delegates and sponsors will receive a full refund. In the event of a cancellation, a special note to our ever-important and valued sponsors - please know



you will all retain your first right of refusal for the 2021 conference on May 27-28.

STEP Canada Media

Keep an eye out for this Wednesday's (April 8) edition of the Globe and Mail Report on Business special national feature on Family Business.

The feature includes a STEP Canada advertisement and an editorial promoting STEP and the TEP designation to family businesses and the Canadian public.



An advertisement for a special feature in the Globe and Mail. The main graphic is a white sign hanging from a string that says 'FAMILY BUSINESS OPEN Today's Special: Succession Planning'. To the right, text reads: 'Featuring expert advice from specialists who advise family business owners on planning for succession between generations while preserving family harmony.' Below this is a list of professionals: 'Trust and Estate Lawyer, TEP', 'Tax Accountant, TEP', 'Certified Financial Planner, TEP', and 'Insurance Advisor, TEP'. A dark blue box contains the text: 'Seek advice from designated TEP professionals, Trust and Estate Practitioners' and 'Find a TEP at step.org/step-directory'. At the bottom, there is a QR code, the text 'You can talk to a TEP. advisingfamilies.org/Canada/ Why use a TEP? Find a TEP Information Portal', and the STEP Canada logo with the tagline 'ADVISING FAMILIES ACROSS GENERATIONS'.

STEP Private Client Awards

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognise and celebrate excellence among private client solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors.

Entries for the STEP Private Client Awards 2020/21 are now open, [view categories and criteria](#). The deadline for submissions have been extended until **June 26, 2020**.



Career Centre

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 Opportunity](#)
[Post an Opportunity](#)

Regional Trust Officer - MD
 Financial Management, Vancouver, BC

Private Trust Manager - TD
 Private Trust, Vancouver, BC

Education Centre

Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines*
CETA 1	Accessible at any time	Exams must be completed within 6 months of registration
CETA 2-4 (English & French)	June 1, 2020 September 8, 2020	May 1, 2020 August 8, 2020
STEP Diploma Program (English & French)	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
Essay Submission	May 1, 2020 October 1, 2020	-

**It is recommended that you register in advance of this deadline to ensure sufficient preparation time.*

Notice from the Education Team

Examinations are scheduled as planned for our CETA and Diploma courses. The protocol for the online examinations will be revised to allow for a streamlined approach that accounts for the changing environment

examinations will be revised to allow for a streamlined approach that accounts for the changing environment inside the home due to social-distancing measures. The new online exam protocol will continue to ensure a secure test-taking experience. Affiliates/Associates will have access to updated exam instructions and system test on the course website by [April 10, 2020](#). Affiliates/Associates should refer to the COVID-19 Exam Notice that is posted on the course website for detailed information. Questions concerning the current COVID-19 situation and the examinations should be directed to the Education Manager at aedwards@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 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

[Contact Education](#)

Branch Event Centre

CANCELLED - Branch and Chapter Events March 18 through June 2020

STEP Canada's executive committee has determined it is in the best interest of STEP Canada to cancel all STEP branch and chapter events from now until the end of June 2020. This decision was not taken lightly and was supported by the board of directors. Refunds for registration fees paid are in process.

We are very hopeful you all remain well and that we can look forward to seeing you, in some way, at future events.

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[Got Questions? Please Contact Us](#) | [Phone: 416-491-4949 ext.221](#) | [Toll-free: 1-877-991-4949](#) | [step.ca](#)

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